



Financial Services Cloud Developer Guide

Salesforce, Summer '25

Summer '25



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FINANCIAL SERVICES CLOUD DEVELOPER GUIDE

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

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

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

SEE ALSO:

[Financial Services Cloud Admin Guide](#)

FINANCIAL SERVICES CLOUD STANDARD OBJECTS

AccountAccountRelation

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field	Details
	<p>Description Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are:</p> <ul style="list-style-type: none"> • Official Register • Primary Research • Self Declaration • Third Party • Verified
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship ended.</p>
HierarchyType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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:</p> <ul style="list-style-type: none"> • Child • Parent • Peer <p>The default value is Parent.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the relationship is active (true) or not (false). The default value is false.</p>
IsShareholder	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Group, Sort</p> <p>Description Name of the account account relationship.</p>
PartyRoleRelationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The relationship between two accounts. This field is a relationship field.</p> <p>Relationship Name PartyRoleRelation</p> <p>Relationship Type Lookup</p> <p>Refers To PartyRoleRelation</p>
RelatedAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The related account in the relationship. This field is a relationship field.</p> <p>Relationship Name RelatedAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>

Field	Details
RelatedInverseRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record that specifies the inverse relationship between the accounts. This field is a relationship field.</p> <p>Relationship Name RelatedInverseRecord</p> <p>Relationship Type Lookup</p> <p>Refers To AccountAccountRelation</p>
ShareholderHierarchyLevel	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.</p>
ShareholderHierarchyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the shareholder's ownership type. Possible values are: <ul style="list-style-type: none"> Domestic Ultimate Owner Immediate Shareholder Intermediate Shareholder Ultimate Beneficial Owner </p>
ShareholderType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the shareholder.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Shareholding • Voting Rights • Beneficiary of a Trust • Sole Proprietor • Partner
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship started.</p>
TotalSharePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.</p>

AccountFinancialSummary

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field	Details
	<p>Description The date when the latest transaction was last updated.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account financial summary record.</p>
PartyRelationshipGroupId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The party relationship group associated with the account.</p> <p> Note:</p> <ul style="list-style-type: none"> This field is auto populated, if the account record type is a business account and has an associated PartyRelationshipGroupId. <p>This field is a relationship field.</p> <p>Relationship Name PartyRelationshipGroup</p> <p>Refers To PartyRelationshipGroup</p>
TotalFinancialAccountBal	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The net balance of all the financial accounts associated with the account.</p>
TotFinclAcctBalanceUpdtDt	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the total financial account balance was last updated.</p>
TotalHeldFinclAcctValue	<p>Type currency</p>

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

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

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

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

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

Associated Objects

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

[AccountFinancialSummaryChangeEvent on page 956 \(API Version 63.0\)](#)

Change events are available for the object.

[AccountFinancialSummaryHistory on page 968 \(API Version 63.0\)](#)

History is available for tracked fields of the object.

AccountParticipant

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the account related to the participant.</p>
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes about this participant.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this participant is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An automatically generated name for the participant.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the user or group related to the participant.</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the object-based role for this participant.</p>

Associated Objects

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

[AccountParticipantChangeEvent on page 956](#)

Change events are available for the object.

[AccountParticipantFeed on page 960 \(API version 52.0\)](#)

Feed tracking is available for the object.

[AccountParticipantHistory on page 968 \(API version 52.0\)](#)

History is available for tracked fields of the object.

AccountPlanObjectiveCategory

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

Supported Calls

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

Fields

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

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

Associated Objects

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

[AccountPlanObjectiveCategoryChangeEvent on page 956](#)

Change events are available for the object.

[AccountPlanObjectiveCategoryHistory on page 968](#)

History is available for tracked fields of the object.

[AccountPlanObjectiveCategoryOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[AccountPlanObjectiveCategoryShare on page 976](#)

Sharing is available for the object.

AppFormProdPrpsAttribute

Represents the attributes and values of an Application Form Product Proposal record. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

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

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

Associated Objects

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

[AppFormProdtPrpsAttributeChangeEvent on page 956](#)

Change events are available for the object.

AppFormProductParticipant

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

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

Supported Calls

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

Fields

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

Field	Details
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the application form product participant record.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The participant that's associated with the application form. This field is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
Description	Represents details like the name and associated default access level for a role that a participant can have in the context of a parent record.
	This field is a relationship field.
Relationship Name	ParticipantRole
Relationship Type	Lookup
Refers To	ParticipantRole

Associated Objects

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

[AppFormProductParticipantChangeEvent on page 956](#)

Change events are available for the object.

[AppFormProductParticipantFeed on page 960](#)

Feed tracking is available for the object.

[AppFormProductParticipantHistory on page 968](#)

History is available for tracked fields of the object.

Applicant

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

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

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary contact for the business entity associated with the applicant. This field is a polymorphic relationship field.</p> <p>Relationship Name BusinessEntityPrimaryCtct</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant, Contact</p>
BusinessEntityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the business entity associated with the applicant. Possible values are:</p> <ul style="list-style-type: none"> Locally Incorporated Company Sole Proprietorship Foreign Company Limited Partnership General Partnership Foundations Trusts
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The related contact ID associated with the account. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>

Field	Details
Email	<p>Type email</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The email address of the applicant.</p>
FirstName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The first name of the applicant.</p>
GroupExposure	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all existing loans an applicant has with the financial institution to which they're applying for a new loan.</p>
LastName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last name of the applicant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MiddleName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The middle name of the applicant.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A unique number that represents the applicant.</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile requesting a product with the application form. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
Phone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant's phone number.</p>
PhoneType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of phone number provided by the applicant. Possible values are:</p> <ul style="list-style-type: none"> • Home • Mobile
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the role of the applicant. Possible values are:</p> <ul style="list-style-type: none"> • Co-Applicant • Co-Signer • Guarantor • Primary Applicant
Salutation	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant's salutation. Possible values are:</p> <ul style="list-style-type: none"> • Dr. • Mr. • Mrs. • Ms. • Prof.
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the stage of the application for a product that is submitted by the applicant.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> Approved In Review On Hold Rejected
Suffix	<p>Type</p> <p>string</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>The suffix of the applicant.</p>
Type	<p>Type</p>
	<p>picklist</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description</p>
	<p>Specifies the type of the applicant.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> Business Individual
UniqueReferenceNumber	<p>Type</p>
	<p>string</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>The customer reference number of the applicant.</p>

Associated Objects

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

[ApplicantChangeEvent on page 956](#)

Change events are available for the object.

[ApplicantFeed on page 960](#)

Feed tracking is available for the object.

[ApplicantHistory on page 968](#)

History is available for tracked fields of the object.

ApplicantOwnerSharingRule on page 973

Sharing rules are available for the object.

ApplicantShare on page 976

Sharing is available for the object.

ApplicantApplicantRelation

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

Supported Calls

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

Fields

Field	Details
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Represents information about a group that is applying. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant</p>
ApplicantRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies how the applicant organization is associated with the related applicant. Possible values are:</p> <ul style="list-style-type: none"> • Parent • Subsidiary

Field	Details
DecisionMakingAuthorityType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the decision-making authority. Possible values are:</p> <ul style="list-style-type: none"> • Authorized Signatory • Board Member • Senior Managing Official
DeclarationType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are:</p> <ul style="list-style-type: none"> • Official Register • Primary Research • Self declaration • Third Party • Verified
IsDecisionMakingAuthority	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a decision-making authority (true) or not (false). The default value is <code>false</code>.</p>
IsShareholder	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is <code>false</code>.</p>

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

Field	Details
	<p>Description ID of the record type associated with the relationship. This field is a relationship field.</p>
	<p>Relationship Name RecordType</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To RecordType</p>
RelatedApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The individual or group that's associated with the applicant. This field is a relationship field.</p> <p>Relationship Name RelatedApplicant</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant</p>
RelatedApplicantRole	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies how the related applicant is associated with the applicant organization. Possible values are:</p> <ul style="list-style-type: none"> • Subsidiary • Parent • CEO • CFO
ShareholderHierarchyLevel	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.</p>
ShareholderHierarchyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the shareholder's ownership type.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Domestic Ultimate Owner • Immediate Shareholder • Intermediate Shareholder • Ultimate Beneficial Owner
ShareholderType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the shareholder.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Shareholding • Voting Rights • Beneficiary of a Trust • Sole Proprietor • Partner
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the relationship between the applicant and the related applicant started.</p>
TotalSharePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.</p>

Associated Objects

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

[ApplicantApplicantRelationChangeEvent on page 956](#)

Change events are available for the object.

[ApplicantApplicantRelationFeed on page 960](#)

Feed tracking is available for the object.

[ApplicantApplicantRelationHistory on page 968](#)

History is available for tracked fields of the object.

[ApplicantApplicantRelationOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ApplicantApplicantRelationShare on page 976](#)

Sharing is available for the object.

ApplicationActionItem

Stores the action items assigned to a user on an application. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The user assigned to the action item. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant, Group, User</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the action item.</p>
DueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The due date of the action item.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the application action item record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the application action item record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The record related to the action item. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant, ApplicationForm, ApplicationFormProduct, ApplicationFormProductDev</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the action item. Valid values are:</p> <ul style="list-style-type: none"> • Closed • In Progress • New

Field	Details
Subject	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subject of the application action item.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of application action item.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Review Offer

Associated Objects

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

[ApplicationactionitemChangeEvent on page 956](#)

Change events are available for the object.

[ApplicationActionItemFeed on page 960](#)

Feed tracking is available for the object.

[ApplicationActionItemHistory on page 968](#)

History is available for tracked fields of the object.

[ApplicationActionItemShare on page 976](#)

Sharing is available for the object.

ApplicationForm

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account that's associated with the application. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
BranchUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the branch unit that owns the application. This field is a relationship field.</p> <p>Relationship Name BranchUnit</p> <p>Relationship Type Lookup</p> <p>Refers To BranchUnit</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

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

Field	Details
	<p>Refers To Opportunity</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The stage in the approval process of the application. Possible values are:</p> <ul style="list-style-type: none"> • Approved • Book to Core • DDE • In Progress • In Review • Initiated • Intake • Negotiation • Operations • Rejected • Submitted • Underwriting
SubmissionDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the application is submitted.</p>
ThirdPartyLoanProviderAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the third party loan provider account associated with the application. This field is a relationship field.</p> <p>Relationship Name ThirdPartyLoanProviderAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage of application. Possible values are:</p> <ul style="list-style-type: none"> • Onboarding • Loan Origination • Other

Associated Objects

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

[ApplicationFormChangeEvent on page 956](#)

Change events are available for the object in API version 60.0 and later.

[ApplicationFormFeed on page 960](#)

Feed tracking is available for the object.

[ApplicationFormHistory on page 968](#)

History is available for tracked fields of the object.

ApplicationFormShare on page 976

Sharing is available for the object.

ApplicationFormEvaluation

Represents the details of the information verification initiated for an object. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

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

Field	Details
	<p>Properties Create, Nullable, Update</p> <p>Description The evaluator's comments to the evaluation.</p>
Date	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date when the evaluation was performed.</p>
Decision	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the decision of the evaluation. Possible values are:</p> <ul style="list-style-type: none"> Approved On Hold Rejected
EvaluatorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The User or Group who evaluated the application form. This field is a relationship field.</p> <p>Relationship Name Evaluator</p> <p>Refers To User</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

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

ApplicationFormParticipant

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

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

Supported Calls

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

Fields

Field	Details
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The application form associated with the participant. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Master-detail</p> <p>Refers To ApplicationForm (the master object)</p>
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The additional information about the participant.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the application form participant is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

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

Associated Objects

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

[ApplicationFormParticipantChangeEvent on page 956](#)

Change events are available for the object.

[ApplicationFormParticipantFeed on page 960](#)

Feed tracking is available for the object.

[ApplicationFormParticipantHistory on page 968](#)

History is available for tracked fields of the object.

ApplicationFormProduct

Represents a junction between an application form product and a deviation. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicantVisibleStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the status of the application form product that is visible to the applicant. Possible values are:</p> <ul style="list-style-type: none">ApplicationApprovedAwaiting SignatureContract GenerationDocument UploadIn ReviewLoan BookedNeed More InfoRejectedSignature CompleteSubmitted

Field	Details
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The application that's submitted for a product request. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationForm</p>
DisbursementMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the method of disbursement for the loan amount. Possible values are: <ul style="list-style-type: none"> • Check • Direct Deposit </p>
HasAutomaticPayment	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the applicant opted in for automatic payments (true) or not (false). The default value is <code>false</code>.</p>
HasElectronicStatement	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the customer opted in for electronic statements (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
IsAtmCardRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an ATM card is required (true) or not (false). The default value is <code>false</code>.</p>
IsCheckbookRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if a checkbox is required (true) or not (false) for the application form product. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of loan being requested. Possible values are:</p> <ul style="list-style-type: none"> • Personal Loan

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the Application Form Product record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
OwnershipType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of ownership for the application form product. Possible values are:</p> <ul style="list-style-type: none"> • Joint • Single
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the application form product. This field is a relationship field.</p> <p>Relationship Name Product</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Product2</p>
RequestedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount requested as part of the application.</p>
RequestedTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The length of the loan in months.</p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the stage of the application form product that is submitted by the applicant. Possible values are:</p> <ul style="list-style-type: none"> • Auto Approved • Auto Rejected • Awaiting Signature • Book to Core • Contract Generation • Customer Approved • Customer Rejected • In Review • Intake • Need More Info • Signature Complete • Submitted • Underwriter Approved • Underwriter Rejected

Associated Objects

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

[ApplicationFormproductChangeEvent on page 956](#)

Change events are available for the object.

[ApplicationFormProductHistory on page 968](#)

History is available for tracked fields of the object.

[ApplicationFormProductOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ApplicationFormProductShare on page 976](#)

Sharing is available for the object.

ApplicationFormProductDev

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

Supported Calls

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

Fields

Field	Details
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Applicant who submitted the application. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Refers To Applicant</p>
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The application that's submitted for a product request. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Refers To ApplicationForm</p>
ApplicationFormProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product that's being applied for in the application. This field is a relationship field.</p> <p>Relationship Name ApplicationFormProduct</p> <p>Relationship Type Master-detail</p> <p>Refers To ApplicationFormProduct (the master object)</p>
ApprovalStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The approval status of the deviation. Possible values are: <ul style="list-style-type: none"> Approved Pending Rejected </p>
ApproverComments	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The approver's comments to the deviation.</p>

Field	Details
ApproverId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The individual or group who approves the deviation. This field is a polymorphic relationship field.</p> <p>Relationship Name Approver</p> <p>Refers To Group, User</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the deviation.</p>
DeviationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The deviation requested for processing the application form. This field is a relationship field.</p> <p>Relationship Name Deviation</p> <p>Refers To Deviation</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MinimumApproverLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the minimum level of the approver who can approve the deviation. Possible values are:</p> <ul style="list-style-type: none"> • L1 • L2 • L3
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the application form product deviation record.</p>
ReviewerComments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reviewer's comments after assessing the deviation. For example, comments from an Underwriter.</p>

ApplicationFormProductFee

Represents the fees associated with an application form. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
ApplicationFormProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product that's being applied for in the application. This field is a relationship field.</p> <p>Relationship Name ApplicationFormProduct</p> <p>Relationship Type Master-detail</p> <p>Refers To ApplicationFormProduct (the master object)</p>
ApplicationFormProductProposalId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product proposal with which the fee is associated. This field is a relationship field.</p> <p>Relationship Name ApplicationFormProductProposal</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationFormProductProposal</p>
FeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The fee amount that's paid by the applicant.</p>

Field	Details
FeeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of fee paid by an applicant. Valid values are:</p> <ul style="list-style-type: none"> • Closing Fee • Origination Fee
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the application form product fee record.</p>
ProductFeeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The base fee associated to the product. This field is a relationship field.</p> <p>Relationship Name ProductFee</p>

Field	Details
Relationship Type	Lookup
Refers To	ProductFee

Associated Objects

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

[ApplicationFormProductFeeChangeEvent on page 956](#)

Change events are available for the object.

[ApplicationFormProductFeeFeed on page 960](#)

Feed tracking is available for the object.

[ApplicationFormProductFeeHistory on page 968](#)

History is available for tracked fields of the object.

ApplicationFormProductProposal

Represents the terms attached to a scheme to sanction the loan. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
AdditionalDetails	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional information about the proposal.</p>
Amount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of the proposal.</p>
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The application form associated with the proposal.</p> <p>This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationForm</p>
ApplicationFormProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The application form product that the proposal is associated with.</p> <p>This field is a relationship field.</p> <p>Relationship Name ApplicationFormProduct</p> <p>Relationship Type Master-detail</p> <p>Refers To ApplicationFormProduct (the master object)</p>
InterestRate	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The interest rate for the product.</p>

Field	Details
InterestRateType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of interest rate for the product. Valid values are:</p> <ul style="list-style-type: none"> • Fixed • Variable
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the offer is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
MonthlyPayment	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The details of the monthly payment.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product proposal record of an application form.</p>
SelectedBy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies who selected the proposal. Valid values are:<ul style="list-style-type: none">• Applicant• Applicant And Lender• Lender</p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The stage of the proposal. Valid values are:<ul style="list-style-type: none">• Final• Pre-Qual</p>
Term	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The term length in months.</p>
TotalInterest	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The total interest.</p>

Field	Details
ValidEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The end date of the proposal.</p>
ValidStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The start date of the proposal.</p>

ApplicationFormSellerItem

Represents a junction between an application form and a seller product. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
ApplicationFormProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product that's being applied for in the application. For example, home loan or auto loan. This field is a relationship field.</p> <p>Relationship Name ApplicationFormProduct</p> <p>Relationship Type Master-detail</p>

Field	Details
	Refers To
	ApplicationFormProduct (the master object)
BuiltUpArea	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The built-up area of the property.
BuiltUpAreaUnit	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The unit of measure for the built up area.
ConstructionStage	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The construction stage of the property.
EngineNumber	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The engine number of the vehicle.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<p>Description Timestamp for when the current user last viewed this record.</p>
Make	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The make of the seller item.</p>
Mileage	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The mileage of the seller item.</p>
Model	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The model of the seller item.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The seller item name.</p>
PartyFinancialAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The information about the financial asset owned by an individual or account. This field is a relationship field.</p> <p>Relationship Name PartyFinancialAsset</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To PartyFinancialAsset</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The price of the product.</p>
PropertyAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address of the property.</p>
PropertyAge	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The age of the property.</p>
PropertyCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city of the property.</p>
PropertyCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country of the property.</p>
PropertyGeocodeAccuracy	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The geocode of the property.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
PropertyLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The latitude of the property.</p>
PropertyLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The longitude of the property.</p>
PropertyPostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code of the property.</p>
PropertyState	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state of the property.</p>
PropertyStreet	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street of the property</p>
PropertyUnitIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit identifier of the property.</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product that the applicant has shown interest in buying. For example, a home or vehicle. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Relationship Type Lookup</p> <p>Refers To Asset, Product2, VendorProject</p>
ScheduledDeliveryDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The delivery date of the product to the applicant.</p>

Field	Details
SellerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The seller ID of the seller item. This field is a relationship field.</p> <p>Relationship Name Seller</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Trim	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The trim type of the seller item.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of product. Valid values are: <ul style="list-style-type: none"> • Bus • Vehicle </p>
VehicleIdentificationNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier for the vehicle.</p>
VehicleRegistrationNumber	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The registration number of the vehicle.</p>
Year	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The manufacture date of the seller item.</p>

Associated Objects

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

[ApplicationFormSellerItemChangeEvent on page 956](#)

Change events are available for the object.

[ApplicationFormSellerItemFeed on page 960](#)

Feed tracking is available for the object.

[ApplicationFormSellerItemHistory on page 968](#)

History is available for tracked fields of the object.

ApplicationFormTerm

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

Supported Calls

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

Fields

Field	Details
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description A form that captures the applicant requirements for a financial product application. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Master-detail</p> <p>Refers To ApplicationForm (the master object)</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date till which a term is related to an application form.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which a term is related to an application form.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the application form term is active (true), or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the associated location was last modified.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date the associated location was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the application form term.</p>
ReferenceRecordID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product or proposal related to an application form term. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Refers To ApplicationFormProduct, ApplicationFormProductProposal</p>
TermDetail	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A detailed description about the term related to an application form that's referenced during the decisioning process.</p>
TermID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A term related to an application form that represents conditions offered to the customer. This field is a relationship field.</p> <p>Relationship Name Term</p>

Field	Details
Refers To	Term

AuthFormRequestRecord

Junction between an Authorization Request and the Salesforce record that is being authorized. For example, the actual financial Salesforce records shared with third parties or any Salesforce record being shared as a result of the consent request. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
<code>InfoAuthRequestFormId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Link to the Information Authorization Request Form related to this record. This is a relationship field.</p> <p>Relationship Name InfoAuthRequestForm</p> <p>Relationship Type Lookup</p> <p>Refers To InfoAuthRequestForm</p>
<code>InfoAuthorizationRequestId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Link to the Information Authorization Request related to this record. This is a relationship field.</p>

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

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

AuthorizedInsuranceLine

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

Supported Calls

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

Fields

Field	Details
Country	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The country where the insurance company can sell this insurance line.</p>
InsuranceLine	<p>Type</p> <p>picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance line that the insurance company is authorized to sell. Possible values are:</p> <ul style="list-style-type: none"> • Disability • Life • Property
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Legal entity ID of the insurance company that this authorization has been issued to.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-number identifier for the insurance line.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description The ID of the record owner.</p>

Associated Objects

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

[AuthorizedInsuranceLineChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[AuthorizedInsuranceLineFeed](#)

Feed tracking is available for the object.

[AuthorizedInsuranceLineHistory](#)

History is available for tracked fields of the object.

[AuthorizedInsuranceLineSharingRule](#)

Sharing rules are available for the object.

[AuthorizedInsuranceLineShare](#)

Sharing is available for the object.

Award

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the organization receiving the award. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
AwardDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date award was received.</p>
AwardedBy	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the issuing organization.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person who received the award and is listed as a contact. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Healthcare provider that this award is associated with.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name HealthcareProvider</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Issuing organization's identifier for the award recipient.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Award name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record. This field is a relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Award status. Example values: <ul style="list-style-type: none"> • Inactive • Revoked • Draft • Verified </p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who received the award and is listed as a user. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To User</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current award status. Example values:</p> <ul style="list-style-type: none"> • Authorized • Pending • Unverified
VerifiedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Award was validated on this date.</p>

Associated Objects

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

[AwardChangeEvent \(API version 61.0\)](#)

Change events are available for the object.

[AwardFeed](#)

Feed tracking is available for the object.

[AwardHistory](#)

History is available for tracked fields of the object.

[AwardOwnerSharingRule](#)

Sharing rules are available for the object.

[AwardShare](#)

Sharing is available for the object.

Banker

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

Supported Calls

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

Fields

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

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description</p>
Level	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the organizational level of the banker. Possible values are:</p> <ul style="list-style-type: none"> • 1 • 2 • 3 • 4 • 5 • 6 • 7 • 8 • 9 • 10 <p>The default value is '1'.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this assignment of a banker to a branch.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>

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

Associated Objects

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

[BankerFeed on page 960](#)

Feed tracking is available for the object.

[BankerHistory on page 968](#)

History is available for tracked fields of the object.

[BankerOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[BankerShare on page 976](#)

Sharing is available for the object.

BranchUnit

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

Supported Calls

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

Fields

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

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

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description The ID of the user who owns this record.</p>
ParentBranchUnitId	<p>Type reference</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The ID of this branch's parent branch unit, if it has one.</p>
ServiceTerritoryId	<p>Type reference</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The ID of a service territory that corresponds to this branch unit.</p>
StartDate	<p>Type date</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The date the branch most recently became active.</p>
Type	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description Specifies the branch interaction type with customers.</p>
	<p>Possible values are:</p> <ul style="list-style-type: none"> Physical—The branch only operates at a physical location PhysicalAndVirtual—Physical and Virtual Virtual—The branch only operates as a virtual entity

Associated Objects

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

BranchUnitChangeEvent on page 956

Change events are available for the object.

BranchUnitFeed on page 960

Feed tracking is available for the object.

BranchUnitHistory on page 968

History is available for tracked fields of the object.

BranchUnitOwnerSharingRule on page 973

Sharing rules are available for the object.

BranchUnitShare on page 976

Sharing is available for the object.

BranchUnitBusinessMember

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

Supported Calls

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

Fields

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

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

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

Associated Objects

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

[BranchUnitBusinessMemberChangeEvent on page 956](#)

Change events are available for the object.

[BranchUnitBusinessMemberFeed on page 960](#)

Feed tracking is available for the object.

[BranchUnitBusinessMemberHistory on page 968](#)

History is available for tracked fields of the object.

BranchUnitCustomer

Represents a customer account that is assigned to or attributed to a branch unit. This object is available in API version 5.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description
	<p>Indicates the branch's level of responsibility for managing the customer account.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Primary • Secondary
	<p>The default value is 'Primary'.</p>
BranchUnitId	Type reference
	Properties
	Create, Filter, Group, Sort
	Description
	<p>The branch that is handling the associated customer account.</p>
LastInteractionDate	Type date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The date when the customer account was associated with the branch.</p>
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user referenced this record.</p>
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user viewed this record.</p>
Name	Type string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	<p>The name of the branch unit customer relationship.</p>

Associated Objects

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

[BranchUnitCustomerChangeEvent on page 956](#)

Change events are available for the object.

[BranchUnitCustomerFeed on page 960](#)

Feed tracking is available for the object.

[BranchUnitCustomerHistory on page 968](#)

History is available for tracked fields of the object.

BranchUnitRelatedRecord

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

Supported Calls

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

Fields

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

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

Field	Details
	<p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The object name or record type of the related record. Possible values are:</p> <ul style="list-style-type: none"> • Account • Case • Lead (Lead and Referral) • Opportunity • Contact • InteractionSummary
RelatedRecordAssocCriteriaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the association criteria that triggered the creation of this record.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the related record.</p>

Associated Objects

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

[branchunitrelatedrecordChangeEvent on page 956](#)

Change events are available for the object.

BrokerOfRecord

Represents a legal authority for the brokerage to act on behalf of their clients with insurance carriers. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account of the client that's associated with the broker of record. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar The default value is USD.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date when the broker of record becomes effective.</p>
EndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the broker of record ends.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of business supported by the broker of record. Possible values are:</p> <ul style="list-style-type: none"> • Employee Benefits • Property & Casualty
LineOfCoverage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of insurance coverage offered by the broker of record.</p>
LostOpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The lost opportunity to identify the expected revenue loss. This field is a relationship field.</p> <p>Relationship Name LostOpportunity</p> <p>Refers To Opportunity</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the broker of record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The current status of the broker of record. Possible values are:</p> <ul style="list-style-type: none"> • In Effect • Lost
WonOpportunityId	<p>Type reference</p>

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

Associated Objects

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

[BrokerOfRecordChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[BrokerOfRecordHistory on page 968](#)

History is available for tracked fields of the object.

[BrokerOfRecordOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[BrokerOfRecordShare on page 976](#)

Sharing is available for the object.

BusinessLicense

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

Supported Calls

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

Fields

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

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

Field	Details
	<p>Description Name of other jurisdiction.</p>
JurisdictionState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description State where license is valid.</p>
JurisdictionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Jurisdiction for the license. Example values:</p> <ul style="list-style-type: none"> • State • County • Province • Country
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LicenseClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The class that the distributor's license belongs to. This field is available from API version 48.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Insurance Producer • Managing General Agent • Public Adjuster
LineOfAuthority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The line of authority that the distributor is licensed for. This field is available from API version 48.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Accident & Health or Sickness • Casualty • Property
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the business or professional license.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PeriodEnd	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's expiration date.</p>

Field	Details
PeriodStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's effective start date.</p>
ResidenceStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Residence status of the producer. This field is available from API version 48.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Non-resident Resident
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status of the license. Example values:</p> <ul style="list-style-type: none"> Inactive Revoked Draft Verified
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person who holds the license and is listed as a user.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Current status for the license. Example values:</p> <ul style="list-style-type: none">• Authorized• Pending• Unverified
VerifiedDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>License was validated on this date.</p>

Associated Objects

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

[BusinessLicenseChangeEvent](#)

Change event tracking is available for the object.

[BusinessLicenseFeed](#)

Feed tracking is available for the object.

[BusinessLicenseHistory](#)

History is available for tracked fields of the object.

[BusinessLicenseOwnerSharingRule](#)

Sharing rules are available for the object.

[BusinessLicenseShare](#)

Sharing is available for the object.

BusinessMilestone

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

Supported Calls

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

Fields

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

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MilestoneDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date on which the business milestone occurred.</p>
MilestoneDescription	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The description of the business milestone.</p>
MilestoneSiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The location where the business milestone occurred. For example, the location where a business deal was won.</p>
MilestoneType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The type of the business milestone. Possible values are:</p> <ul style="list-style-type: none"> • Award • Bankruptcy • Executive Change • Expansion • Incorporation • Market Listing • Merger & Acquisition • New Funding

Field	Details
	<ul style="list-style-type: none"> • New Partnership • New Product Launch
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description An auto-generated number assigned to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
PrimaryAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The primary business account this business milestone is related to.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system. This field is unique within your organization.</p>

Associated Objects

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

BusinessMilestoneChangeEvent on page 956

Change events are available for the object.

BusinessMilestoneFeed

Feed tracking is available for the object.

BusinessMilestoneHistory

History is available for tracked fields of the object.

BusinessProfile

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

Supported Calls

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

Fields

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

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

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

Associated Objects

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

[BusinessProfileChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[BusinessProfileFeed](#)

Feed tracking is available for the object.

[BusinessProfileHistory](#)

History is available for tracked fields of the object.

BusinessProfileOwnerSharingRule on page 973

Sharing rules are available for the object.

BusinessProfileShare on page 976

Sharing is available for the object.

CaseGatewayRequest

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

Supported Calls

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

Fields

Field	Details
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the associated case.</p>
IntegrationPayload	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The data payload for the integration, in JSON format. Here's an example.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"><pre>{ "FlowName": "", "ServiceRequestNumber": "", "ServiceRequestId": "", "AccountId": "", "FinancialAccountId": "" }</pre></div>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p>

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

Claim

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

Supported Calls

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

Fields

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

Field	Details
	Description
	The reason for initiating the claim.
ClaimReasonType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The category that the claim reason belongs to. For example, natural disaster, accident.
ClaimType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of the claim. For example, home, auto, annuity, life, or workers' compensation.
EstimatedAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The estimated cost of damages given by the owner or the repair shop.
FinalizedDate	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date on which the claim was marked resolved, with claim status as approved or rejected.
FinancialAuthorityStatus	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the financial authority status of the claim.
	Possible values are:
	<ul style="list-style-type: none"> • Authority Approved • Authority Denied • No Authority Pending

Field	Details
	<ul style="list-style-type: none"> Pending Authority
FnolChannel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The channel through which the loss was reported. Possible values are:</p> <ul style="list-style-type: none"> Chatbot Mobile Phone Web
IncidentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The incident to which a claim pertains. For example, a claim associated with a catastrophe. This field is available in API version 54.0 and later. This is a relationship field.</p> <p>Relationship Name Incident</p> <p>Relationship Type Lookup</p> <p>Refers To Incident</p>
IncidentSite	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The place where the accident took place. This is a compound field of type Address and combines these fields: IncidentSiteCity, IncidentSiteCountry, IncidentSiteGeocodeAccuracy, IncidentSiteLatitude, IncidentSiteLongitude, IncidentSitePostalCode, IncidentSiteState, and IncidentSiteStreet. For more information, see Address Compound Fields.</p>

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

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

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>
PolicyNumberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the parent insurance policy related to the claim.</p>
RenewalChannel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The channel through which the insurance policy associated with this claim was renewed. This field is deprecated in API version 48.0 and will be removed in API version 52 (the Summer '21 release). Possible values are:</p> <ul style="list-style-type: none"> • Chatbot • Mobile • Phone • Web
RepairShop	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the repair shop where the damaged vehicle was repaired.</p>
RepairShopLocation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The location of the repair shop where the damaged vehicle was repaired.</p>

Field	Details
ReportDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp for when the accident report was filled out.</p>
ReportNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The number of the accident report.</p>
ReportingAuthority	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the authority who filled out the accident report.</p>
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The severity of the claim. For example, high, medium, or low.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the claim.</p>
Summary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the claim.</p>
VisitDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp for when the agent visited the site of the accident or the place where the vehicle was moved after the accident.</p>
VisitSite	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The site that the agent visited.</p>

Associated Objects

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

[ClaimChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

Claim Case

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

Supported Calls

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

Fields

Field	Details
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the case that was opened to handle this claim.</p>
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the claim.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>

Associated Objects

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

[ClaimCaseChangeEvent](#) on page 956

Change events are available for the object in API version 63.0 and later.

[ClaimCaseFeed](#)

Feed tracking is available for the object.

[ClaimCaseHistory](#)

History is available for tracked fields of the object.

ClaimCoverage

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

Supported Calls

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

Fields

Field	Details
ClaimId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The claim associated with this claim coverage.</p>
ClaimItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim item associated with the claim coverage.</p>
ClaimParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim participant associated with this claim coverage.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the coverage for the claim.</p>
ExpenseReserveAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of expense reserve held for this claim coverage.</p>
InsurancePolicyAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy asset associated with this claim coverage.</p>
InsurancePolicyCoverageId	<p>Type reference</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The insurance policy coverage associated with the claim coverage.
InsurancePolicyParticipantId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The insurance policy participant associated with the claim coverage.
InternalReserveMode	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description Specifies the rule for determining the loss reserve amount and expense reserve amount for the coverage of the claim. If the rule is Coverage Reserve, the reserve amounts are stored in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. If the rule is Reserve Worksheet, the reserve amounts are stored in the Claim Coverage Reserve object. The values are added to and displayed in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. Possible values are:
	<ul style="list-style-type: none"> • CoverageReserve—Coverage Reserve • ReserveWorksheet—Reserve Worksheet
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
LossReserveAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of loss reserve held for a claim coverage.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the claim coverage.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of a claim coverage. Possible values are:</p> <ul style="list-style-type: none"> • Closed • Denied • Open

Associated Objects

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

[ClaimCoverageChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

ClaimCoveragePaymentDetail

Represents the claim coverage amount that must be paid to a recipient for a loss or an expense payment. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount the insurance carrier intends to pay for a loss or benefit after making adjustments for deductibles, copay, or coinsurance.</p>
BenefitName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the benefit associated with the claim coverage payment detail.</p>
ClaimCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The Claim Coverage associated with the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name ClaimCoverage</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimCoverage</p>

Field	Details
ClaimCoverageReserveDetailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim Coverage Reserve Detail associated with the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name ClaimCoverageReserveDetail</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimCoverageReserveDetail</p>
ClaimParticipantRecipientId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim Participant Recipient associated with the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name ClaimParticipantRecipient</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimParticipant</p>
ClaimPaymentSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim Payment Summary issued to the Claim Participant Recipient for the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name ClaimPaymentSummary</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To ClaimPaymentSummary</p>
ClaimPayoutPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim Payout Plan associated with the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name ClaimPayoutPlan</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimPayoutPlan</p>
ClaimedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount claimed by the claimant or service provider to pay for a loss or benefit.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the claim coverage.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LimitUnitCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit count that the payment detail represents.</p>
LimitUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the unit of measure that the payment detail represents.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Days • Visits
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the claim coverage payment detail.</p>
PaymentRequestLineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Payment Request Line associated with the Claim Coverage Payment Detail. This field is a relationship field.</p> <p>Relationship Name PaymentRequestLine</p> <p>Relationship Type Lookup</p> <p>Refers To PaymentRequestLine</p>
ScheduledPaymentDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the payment is scheduled.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of claim coverage payment detail. Possible values are:</p> <ul style="list-style-type: none"> • Authority Approved • Authority Denied • Cancelled • Closed W/O Pay • New • Open • Paid

Field	Details
	<ul style="list-style-type: none"> ● Payment Pending ● Pending Authority ● Stopped
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of claim coverage payment detail. Possible values are:</p> <ul style="list-style-type: none"> ● Expense ● Loss

Associated Objects

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

[ClaimCoveragePaymentDetailChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

ClaimCovPaymentAdjustment

Represents the amount increased or decreased on a claim coverage payment as adjustments such as deductibles, copays, or coinsurance when applied on a claimed amount. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The amount after adjustments are made in account for deductibles, copay, or coinsurance.</p>
AdjustmentReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the claim coverage payment detail adjustment such as deductible, copay, or coinsurance.</p>
ClaimCoveragePaymentDetailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The Claim Coverage Payment Detail associated with the Claim Coverage Payment Adjustment. This field is a relationship field.</p> <p>Relationship Name ClaimCoveragePaymentDetail</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimCoveragePaymentDetail</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>

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

Associated Objects

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

[ClaimCovPaymentAdjustmentChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ClaimCovReserveAdjustment](#)

Represents the amount adjusted on a claim coverage reserve as the reserve is changed and payments are made. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustmentAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount after adjustments are made in account for deductibles, copay, or coinsurance.</p>
AdjustmentReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the claim coverage reserve adjustment.</p>
ClaimCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The Claim Coverage associated with the Claim Coverage Reserve Adjustment. This field is a relationship field.</p> <p>Relationship Name ClaimCoverage</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimCoverage</p>
ClaimCoverageReserveDetailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim Coverage Reserve Detail associated with the Claim Coverage Reserve Adjustment. This field is a relationship field.</p> <p>Relationship Name ClaimCoverageReserveDetail</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To ClaimCoverageReserveDetail</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the claim coverage reserve adjustment.</p>

Associated Objects

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

[ClaimCovReserveAdjustmentChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

ClaimFinancialSettings

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

Supported Calls

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

Fields

Field	Details
ClaimCovPendingAuthStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim coverage.</p>
ClaimPendingAuthorityStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim.</p>
ClmCovPymtDtlPendAuthSts	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim coverage payment detail.</p>
DeveloperName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for the claim financial settings object.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the claim financial settings.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique label that identifies the claim financial settings throughout the Salesforce user interface.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

ClaimItem

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

Supported Calls

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

Fields

Field	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the category of the claim item. This field is available from API version 51.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Damaged Property • Involved Injury
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent claim that includes this claim item.</p>
ClaimParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim participant associated with the claim item. This field is available from API version 51.0 and later.</p>
CurrentAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The location of the claim item. This field is available from API version 51.0 and later.</p> <p>This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	Description
	The description of the claim item.
InsurancePolicyAssetId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The insurance policy asset associated with the claim item. This field is available from API version 51.0 and later.
InsurancePolicyCoverageId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the coverage that covers this claim item.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the item that's included in the claim.

Associated Objects

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

[ClaimItemChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ClaimItemFeed](#)

Feed tracking is available for the object.

[ClaimItemHistory](#)

History is available for tracked fields of the object.

ClaimParticipant

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

Supported Calls

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

Fields

Field	Details
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the claim in which this participant has one or more roles.</p>
InsurancePolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the insurance policy participant associated with this claim. This field is available from API version 51.0 and later.</p>
IsInjured	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the claim participant was injured in the accident. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
ParticipantAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the claim participant's account.</p>
ParticipantContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the claim participant's contact.</p>
Roles	<p>Type multipicklist</p>

Field	Details
	<p>Properties Create, Filter, Update</p> <p>Description The roles that the claim participant can have in the claim. For example, witness, victim, defendant, claimant.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>

Associated Objects

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

[ClaimParticipantChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ClaimParticipantFeed](#)

Feed tracking is available for the object.

[ClaimParticipantHistory](#)

History is available for tracked fields of the object.

ClaimPayoutPlan

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

Supported Calls

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

Fields

Field	Details
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The claim associated with the claim payout plan. This field is a relationship field.</p> <p>Relationship Name Claim</p> <p>Relationship Type Lookup</p> <p>Refers To Claim</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date the claim payout plan ends.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the claim payout plan.</p>
PaymentFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the frequency of the payment if the coverage entails a recurring payout to the insured. Possible values are:</p> <ul style="list-style-type: none"> • Bi-Weekly • Monthly • Weekly • Yearly
PlannedPaymentAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount paid to the party at each payout.</p>

Field	Details
PreviousClaimPayoutPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The previous payout plan associated with the claim payout plan. This field is a relationship field.</p> <p>Relationship Name PreviousClaimPayoutPlan</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimPayoutPlan</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date the claim payout plan starts.</p>

Associated Objects

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

[ClaimPayoutPlanChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ClaimPayoutPlanFeed on page 960](#)

Feed tracking is available for the object.

[ClaimPayoutPlanHistory on page 968](#)

History is available for tracked fields of the object.

[ClaimPaymentSummary](#)

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

Supported Calls

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

Fields

Field	Details
CancellationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which claim payment was canceled.</p>
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the claim associated with this claim payment.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the claim payment summary.</p>

Field	Details
PaymentAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of the payment.</p>
PaymentDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the claim payment was initiated.</p>
PaymentIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique identifier for the payment record assigned by the financial transaction system.</p>
PaymentStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the claim payment. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Paid • Pending Payment • Stopped

Associated Objects

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

[ClaimPaymentSummaryChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

ClaimRecovery

Represents a recovery of funds on an insurance claim through subrogation and salvage activities. Recovered amounts can come from a salvage company or through legal litigation or arbitration. Master-detail child object of Claim. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
ClaimCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim coverage associated with the claim recovery. This is a relationship field.</p> <p>Relationship Name ClaimCoverage</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimCoverage</p>
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The claim associated with the claim recovery. This is a relationship field.</p> <p>Relationship Name Claim</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Claim</p>
EstimatedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The estimated amount the insurance carrier identified to pursue for the claim recovery.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Claim Recovery record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
RecoveredAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual amount the insurance carrier recovered.</p>
RecoveredOnDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp the amount was recovered. For multi-currency scenarios, the recovery date is used to retrieve currency conversion rates.</p>
RecoveryFromAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that the claim is recovered from. This is a relationship field.</p> <p>Relationship Name RecoveryFromAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Status of the claim recovery. Possible values are:</p> <ul style="list-style-type: none"> Accepted Recovery Accepted with Additional Pursuit Additional Recovery Pursued Disputed Recovery Estimated Partially Recovered Pursued Recovery Canceled Recovery Written Off Referred to Other Department
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of claim recovery. Possible values include:</p> <ul style="list-style-type: none"> Salvage Subrogation

Associated Objects

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

[ClaimRecoveryChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ClaimRecoveryFeed on page 960](#)

Feed tracking is available for the object.

[ClaimRecoveryHistory on page 968](#)

History is available for tracked fields of the object.

[ClaimRecoveryOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ClaimRecoveryShare on page 976](#)

Sharing is available for the object.

ClaimTeamMember

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

Supported Calls

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

Fields

Field	Details
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The claim associated with the claim team member. This is a relationship field.</p> <p>Relationship Name Claim</p> <p>Relationship Type Lookup</p> <p>Refers To Claim</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the claim team member record.</p>
Role	<p>Type multipicklist</p> <p>Properties Create, Filter, Update</p> <p>Description The role of the claim team member.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Claim Admin • Claim Owner • Claim Supervisor • Special Investigative Unit
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The user associated with the claim as a claim team member.</p> <p>This is a relationship field.</p> <p>Relationship Name User</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>

Associated Objects

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

[ClaimTeamMemberFeed on page 960](#)

Feed tracking is available for the object.

ClaimTeamMemberHistory on page 968

History is available for tracked fields of the object.

CommissionStatement

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that's associated with the commission statement. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AccountName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account name associated with the commission statement.</p>
AccountingDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The accounting date of the commission statement.</p>

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external identifier of the financial instrument associated with the commission payment. For example, cheque number or ACH number.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	Description
	<p>The name of the commission statement summary record.</p>
OwnerId	Type
	<p>reference</p>
	Properties
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	Description
	<p>ID of the owner of this object.</p>
	<p>This field is a polymorphic relationship field.</p>
	Relationship Name
	<p>Owner</p>
	Refers To
	<p>Group, User</p>
PaymentMethod	Type
	<p>picklist</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>Specifies the payment method used to pay the commission.</p>
StatementDate	Type
	<p>date</p>
	Properties
	<p>Create, Filter, Group, Sort, Update</p>
	Description
	<p>The date when the commission statement was generated for an account.</p>
Status	Type
	<p>picklist</p>
	Properties
	<p>Create, Filter, Group, Restricted picklist, Sort, Update</p>
	Description
	<p>Specifies the status of the commission statement summary.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Closed • Failed • In Progress • New

Field	Details
	<ul style="list-style-type: none"> Processed Processed With Failures
TotalBasisAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total basis amount that's used to calculate the total commission amount in the commission statement.</p>
TotalCommissionAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The total commission amount associated with the commission statement.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of commission statement.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the application using the commission statement to populate data. Possible values are: <ul style="list-style-type: none"> InsuranceBrokerage—Insurance Brokerage Other </p>

Associated Objects

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

[CommissionStatementChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

CommissionStatementHistory on page 968

History is available for tracked fields of the object.

CommissionStatementOwnerSharingRule on page 973

Sharing rules are available for the object.

CommissionStatementShare on page 976

Sharing is available for the object.

CommissionStatementLineItem

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

Supported Calls

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

Fields

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

Field	Details
ClientAccountName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the client associated with the insurance policy.</p>
CommissionAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The commission amount associated with the insurance policy in the commission statement line item.</p>
CommissionPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The rate that's used for the commission calculation.</p>
CommissionStatementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The commission statement associated with the commission statement line. This field is a relationship field.</p> <p>Relationship Name CommissionStatement</p> <p>Relationship Type Master-detail</p> <p>Refers To CommissionStatement (the master object)</p>
CommissionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	
Specifies the type of commission associated with the commission statement line item.	
CurrencyIsoCode	Type picklist
Properties	
Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
Description	
If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	
Possible values are:	
<ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar 	
The default value is USD.	
ExternalIdentifier	Type string
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The external reference number associated with the commission statement line item.	
FailureMessage	Type string
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The failure message when processing fails for the commission statement line item.	
InsurancePolicyEffectiveDate	Type date
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The effective date of the insurance policy that's specified in the commission statement.	
InsurancePolicyExpirationDate	Type date
Properties	
Create, Filter, Group, Nillable, Sort, Update	

Field	Details
	Description
	The date until when the insurance policy remains effective.
InsurancePolicyNumber	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The insurance policy number specified in the commission statement.
InsurancePolicyRenewalDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The renewal date of the insurance policy that's specified in the commission statement.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
LineOfBusiness	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the line of business for the commission statement line item.
	Possible values are:
	<ul style="list-style-type: none"> Employee Benefits

Field	Details
	<ul style="list-style-type: none"> Property & Casualty
LineOfCoverage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the coverage type for the commission statement line item.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the commission statement line item.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceRecordId	The reference record associated with the commission statement line item.
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the commission statement line item.</p>
TransactionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date on which the transaction that generated the commission has occurred.</p>
TransactionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the transaction type of the commission statement line item.</p>

Associated Objects

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

[CommissionStatementLineItemChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[CommissionStatementLineItemHistory on page 968](#)

History is available for tracked fields of the object.

[CommissionStatementLineItemOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[CommissionStatementLineItemShare on page 976](#)

Sharing is available for the object.

ContractGroupPlan

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The group account associated with the contract group plan. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ContractGroupParentPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contract group parent plan associated with the contract group plan. This is a relationship field.</p> <p>Relationship Name ContractGroupParentPlan</p> <p>Relationship Type Lookup</p> <p>Refers To ContractGroupPlan</p>
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The contract associated with the contract group plan. This is a relationship field.</p> <p>Relationship Name Contract</p> <p>Relationship Type Lookup</p> <p>Refers To Contract</p>
EffectiveEndDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The effective end date of the plan line item.</p>
EffectiveStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The effective start date of the plan line item.</p>
EligibilityCriteria	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The eligibility criteria for the contract group plan.</p>
EnrollmentEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when enrollment ends for the plans in the contract.</p>
EnrollmentRatingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the enrollment rating type. Possible values are: <ul style="list-style-type: none"> • Composite • Rate </p>
EnrollmentStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	
The date when enrollment starts for the plans in the insurance contract.	
EnrollmentWaitingPeriod	Type int
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The waiting period in days after joining date before enrollment can begin.	
GroupNumber	Type string
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The group number associated with the group account. Required for the enrollment process.	
IsOptional	Type boolean
Properties	
Create, Defaulted on create, Filter, Group, Sort, Update	
Description	
Indicates whether the coverage product plan is optional (true) or mandatory (false).	
The default value is <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.	
Name	Type string

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

Field	Details
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The quote line item associated with the contract group plan. This is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Lookup</p> <p>Refers To QuoteLineItem</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the group contract plan. Possible values are: <ul style="list-style-type: none"> • Active • Inactive </p>
UnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The price of the contract group plan.</p>
UsageType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are: <ul style="list-style-type: none"> • Insurance </p>

Field	Details
	The default value is 'Insurance'.

Associated Objects

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

[ContractGroupPlanChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ContractGroupPlanFeed on page 960](#)

Feed tracking is available for the object.

[ContractGroupPlanHistory on page 968](#)

History is available for tracked fields of the object.

ContractGroupPlanGroupClass

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

Supported Calls

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

Fields

Field	Details
ContractGroupPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Contract Group Plan associated with the Contract Group Plan Group Class. This field is a relationship field.</p> <p>Relationship Name ContractGroupPlan</p> <p>Relationship Type Lookup</p> <p>Refers To ContractGroupPlan</p>

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Group Class associated with the Contract Group Plan Group Class.</p> <p>This field is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Relationship Type Lookup</p> <p>Refers To GroupClass</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the contract group plan group class.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Owner associated with the Contract Group Plan Group Class. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

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

[ContractGroupPlanGroupClassChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ContractGroupPlanGroupClassFeed on page 960](#)

Feed tracking is available for the object.

[ContractGroupPlanGroupClassHistory on page 968](#)

History is available for tracked fields of the object.

[ContractGroupPlanGroupClassOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ContractGroupPlanGroupClassShare on page 976](#)

Sharing is available for the object.

CoverageType

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

Supported Calls

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

Fields

Field	Details
BenefitPaymentFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of the payment if the benefit or coverage entails a recurring payout to the insured.</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category that the coverage belongs to. For example, benefit, clause, deductible, rider.</p>
CategoryCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.</p>
CategoryGroup	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.</p>

Field	Details
CategoryGroupType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the category group.</p>
CategoryGroupTypeValue	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Identifies the coverage limit type. For example, for a liability coverage of USD 1000 per person and USD 1500 per occurrence, Amount per Person and Amount per Occurrence are the category group type values.</p>
CoverageCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A carrier-specific code that identifies the policy limit code in the source system.</p>
DeathBenefitOptionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The method for the payment of death benefit.</p>
DeductibleAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The deductible amount that the customer must pay.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The description of the coverage type.</p>
Discount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount that was given on the coverage or the benefit.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from which the coverage is in effect.</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the coverage expires.</p>
IncomeOptionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LimitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.</p>
LimitDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.</p>
LimitPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the actuals covered by this coverage.</p>
LimitRange	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description An auto-generated number assigned to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>
PremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium paid by the customer for this coverage.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this coverage record in the source system.</p>

Associated Objects

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

[CoverageTypeChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[CoverageTypeFeed](#)

Feed tracking is available for the object.

[CoverageTypeHistory](#)

History is available for tracked fields of the object.

CoverageTypeOwnerSharingRule

Sharing rules are available for the object.

CoverageTypeShare

Sharing is available for the object.

CustomerProperty

Represents the insurable and insured properties of a customer.

Supported Calls

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

Fields

Field	Details
Address	Type address Properties Filter, Nillable Description The location of the property. This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields .
AnnualMileage	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The distance that the vehicle is expected to be driven in a year.
AssetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the asset associated with this customer property.

Field	Details
BathroomCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of bathrooms in the property.</p>
BedroomCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of bedrooms in the property.</p>
BuiltUpArea	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The property's usable area, which is also known as the carpet area.</p>
CeilingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the ceiling the property has. For example, conventional, beam, shed, cove, tray, suspended.</p>
ConstructionClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the property's construction. For example, framed, masonry non-combustible, modified, semi-resistive, or fire resistive.</p>
DaysDrivenTowork	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The number of days that the vehicle was used to drive to work.
Description	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the asset.
DwellingType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The property's dwelling type on the policy creation date. For example, ranch, single family, or condo.
EngineDisplacementVolume	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The engine capacity of the vehicle.
FactoryPrice	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The price of the vehicle billed by the manufacturer.
FairMarketValue	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The estimated market price of the vehicle on the policy creation date.
FinancingType	Type picklist

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of financing used to purchase the asset.</p>
FloorCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of stories in the property.</p>
FloorType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the floor the property had on the policy creation date. For example, ceramic tile, porcelain tile, floating wood tile.</p>
FoundationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the property's foundation. For example, pier and beam, slab.</p>
FuelType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fuel system of the vehicle.</p>
GarageSpaceCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of parking spaces available in the property.</p>

Field	Details
GarageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the garage the property has.</p>
GrossVehicleWeight	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Vehicle's weight.</p>
IsBasementIncluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the property has a basement. The default value is False.</p>
IsChimneyIncluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the property has a chimney. The default value is False.</p>
IsPassedSmogCheck	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the vehicle has passed the smog check. The default value is False.</p>
IsSwimmingPoolIncluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the property has a swimming pool. The default value is False.</p>

Field	Details
KitchenCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of kitchens in the property.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LeasePeriod	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current lease period for the property.</p>
LienHolderName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The bank or the financial firm that legally owns the asset.</p>
LoadCapacity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	Vehicle's load-carrying capacity.
LotArea	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The total area of the plot on which the property is constructed, including the construction area and the open area on all sides.
Make	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The brand of the vehicle.
MakeYear	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The year in which the vehicle was manufactured.
MilesDrivenToWork	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of miles that the vehicle covered when it was used to drive to work.
ModelName	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The model name of the vehicle.
Name	Type string

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
OdometerReading	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Vehicle's odometer reading on the policy creation date.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>
PassengerSeatCapacity	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal seating capacity of the vehicle.</p>
PrimaryOwnerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the primary owner of the asset.</p>
PrimaryUse	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description What the vehicle is primarily going to be used for.</p>
PurchaseDate	<p>Type date</p>

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which this property was purchased.
PurchasePrice	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount of money paid by the owner to purchase this property.
RegistrationNumber	Type
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	Vehicle's license plate number.
RegistrationType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Vehicle's registration type. For example, antique, combo, apportioned, commercial.
RoofType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of the roof the property has.
SourceSystem	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the source system this property record was obtained from.
SourceSystemIdentifier	Type
	string

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this property record in the source system.</p>
TransmissionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transmission type of the vehicle.</p>
Vin	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Vehicle's identification number.</p>
YearBuilt	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The year in which the property was constructed.</p>

Associated Objects

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

[CustomerPropertyChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[CustomerPropertyFeed](#)

Feed tracking is available for the object.

[CustomerPropertyHistory](#)

History is available for tracked fields of the object.

[CustomerPropertyOwnerSharingRule](#)

Sharing rules are available for the object.

[CustomerPropertyShare](#)

Sharing is available for the object.

CustomObjectParticipant

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

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The additional information about the participant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The user or group associated with this participant. This field is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The role associated with the participant. This field is a relationship field.</p> <p>Relationship Name ParticipantRole</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To ParticipantRole</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort</p> <p>Description The parent custom object record that's related to this participant record. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Relationship Type Lookup</p> <p>Refers To FSC12__AccountAccountRelation__c, FSC12__Alert__c, FSC12__AssetsAndLiabilities__c, FSC12__B2CLeadCompanyNameConfig__c, FSC12__BillingStatement__c, FSC12__Card__c, FSC12__ChargesAndFees__c, FSC12__ContactContactRelation__c, FSC12__Education__c, FSC12__Employment__c, FSC12__FinancialAccountRole__c, FSC12__FinancialAccountTransaction__c, FSC12__FinancialAccount__c, FSC12__FinancialGoal__c, FSC12__FinancialHolding__c, FSC12__IdentificationDocument__c, FSC12__IndustriesAppConfig__c, FSC12__IndustriesSettings__c, FSC12__LifeEvent__c, FSC12__NextLastInteractionSettings__c, FSC12__PolicyPaymentMethod__c, FSC12__QueryOptimization__c, FSC12__ReciprocalRole__c, FSC12__Record_Rollup_Configuration__c, FSC12__Record_Rollup_and_Trigger_Configuration__c, FSC12__Revenue__c, FSC12__RollupByLookupConfig__c, FSC12__RollupByLookupFilterCriteria__c, FSC12__Securities__c, FSC12__UsePersonAccount__c, FSC12__WealthAppConfig__c, FSC12__individualExcludedFields__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c</p>

Associated Objects

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

CustomObjectParticipantChangeEvent on page 956

Change events are available for the object.

CustomObjectParticipantFeed

Feed tracking is available for the object.

CustomObjectParticipantHistory

History is available for tracked fields of the object.

CustomObjectParticipantShare

Sharing is available for the object.

Deviation

Represents the information about the deviation from set rules. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
ApprovalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the approval status of the deviation. Possible values are: <ul style="list-style-type: none">ApprovedPendingRejectedSubmitted
Code	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The unique code for the deviation.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description about the deviation.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the deviation is active (true) or (not). The default value is <code>false</code>.</p>
IsApprovalRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an approval is required (true) or not (false) for the deviation. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
MinimumApproverLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the minimum level of the approver who can approve the deviation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • L1 • L2 • L3
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the deviation record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of deviation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Credit • Debt to Income • Loan To Value

Field	Details
	<ul style="list-style-type: none"> Sanction Terms

Dispute

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

Supported Calls

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

Special Access Rules

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

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The Person Account associated with the dispute. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>

Field	Details
ActualAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of all associated transactions.</p>
ApprovedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that's approved to be credited to the customer.</p>
AssessmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Assessment associated with the dispute. This field is a relationship field.</p> <p>Relationship Name Assessment</p> <p>Relationship Type Lookup</p> <p>Refers To Assessment</p>
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Case associated with the dispute. This is the related case to track the lifecycle of the dispute. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Case</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the dispute.</p>
DisputeSubtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the subtype of dispute.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Account Debited but No Cash Dispensed by ATM • Charged Multiple Times • Defective Product • Disclosed OTP, Card, or Account Details • Failed Transaction • Fraudulent Transaction • Lost or Stolen Card • Outstanding Charge on Original Payment Method • Overcharged • Products or Services Not as Described • Refund Not Processed • Undelivered Product or Service
DisputeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of dispute.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Processing Error • Consumer Dispute

Field	Details
	<ul style="list-style-type: none"> • Fraud
DisputedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount claimed in the dispute.</p>
IsCardCancellationRequested	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether card cancellation was requested (true) or not (false). The default value is <code>false</code>.</p>
IsCardReissueRequested	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether card reissue was requested (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the Dispute record</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ReceivedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date when the dispute was reported to the bank.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the disputed transaction. Possible values are:</p> <ul style="list-style-type: none"> • In Review • Invalid • No longer disputed • Resolved • Settled • Submitted

Associated Objects

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

[DisputeHistory on page 968](#)

History is available for tracked fields of the object.

[DisputeOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[DisputeShare on page 976](#)

Sharing is available for the object.

Disputeltem

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

Supported Calls

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

Fields

Field	Details
AcquirerReferenceNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A unique identifier assigned to a transaction by the payment network if the transaction was done through a payment gateway. Available in version 61.0 and later.
ApprovedProvisionalCredit	Type currency Properties Create, Filter, Nillable, Sort, Update Description The provisional credit amount that's approved for the dispute. Available in version 60.0 and later.
CardBrand	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p>Description</p> <p>Specifies the brand or network associated with the card that was used in the disputed transaction.</p>
CardLastFourDigit	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The last four digits of the credit or debit card number that's associated with this transaction. These digits are commonly used to verify the transaction and identify the cardholder. Available in version 60.0 and later.</p>
CardSixDigitBin	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The first six digits of the credit or debit card number that's associated with this transaction. These digits are used to identify the card issuer. Available in version 60.0 and later.</p>
CardType	<p>Type</p> <p>picklist</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description</p> <p>Specifies the type of card used in the transaction. Available in version 61.0 and later.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Credit Card
	<ul style="list-style-type: none"> • Debit Card
	<ul style="list-style-type: none"> • Prepaid Card
CaseClaimIdentifier	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>A unique identifier of the claim associated with an arbitration or compliance case . Available in version 62.0 and later.</p>
ClaimIdentifier	<p>Type</p> <p>string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique identifier of the claim associated with the chargeback. Available in version 61.0 and later.</p>
ClearingMerchantName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the merchant or business that accepted the payment through a card transaction. Available in version 61.0 and later.</p>
ClearingTrxnAmountLocal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The cleared amount of the disputed transaction in the local currency.. Available in version 62.0 and later.</p>
ClearingTrxnAmountLocalCrcy	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The cleared amount of the disputed transaction in the local currency. Available in version 62.0 and later.</p>
DisputeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique identifier of the transaction. This field is a relationship field.</p> <p>Relationship Name Dispute</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Dispute</p>
DisputeReasonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Dispute Reason associated with the dispute item. Available in version 61.0 and later. This field is a relationship field.</p> <p>Relationship Name DisputeReason</p> <p>Relationship Type Lookup</p> <p>Refers To DisputeReason</p>
DisputedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount in the transaction that's under question or dispute.</p>
EnrichmentProvider	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the name of the enrichment provider that provides additional information associated with the transaction, such as merchant name, address, description, and URL. Available in version 60.0 and later.</p>
FundFlowDirection	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the direction of funds in the transaction that's being disputed. Available in version 60.0 and later. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Credit • Debit • INFLOW • OUTFLOW • Withdrawal
IsCardPresent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the payment card was present with the cardholder (true) or not (false) during the transaction. Available in version 61.0 and later. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MerchantAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address of the merchant associated with the transaction. Available in version 60.0 and later.</p>
MerchantCategory	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The category associated with the merchant based on the type of products or services the merchant provides. Available in version 60.0 and later.</p>
MerchantDescription	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The description of the merchant associated with the transaction. Available in version 60.0 and later.</p>
MerchantName	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The name of the merchant associated with the transaction. Available in version 60.0 and later.</p>
MerchantUrl	Type
	url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The website URL of the merchant associated with the transaction. Available in version 60.0 and later.</p>
MerchantLogoUrl	Type
	url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The logo URL of the merchant associated with the transaction. Available in version 60.0 and later.</p>
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	Name of the Disputeltem record.

Field	Details
PaymentNetwork	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the payment network that facilitates the exchange of funds between parties involved. Available in version 61.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ACH • American Express • Diners • Mastercard • Visa • Zelle
ProvisionalCreditApproverId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The User associated with the Dispute. The user is the approver of provisional credit amount. Available in version 60.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name ProvisionalCreditApprover</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
ProvisionalCreditDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the provisional credit amount was credited. Available in version 60.0 and later.</p>
ProvisionalCreditStatus	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the provisional credit amount. Available in version 60.0 and later. Possible values are:</p> <ul style="list-style-type: none"> • Completed • In Progress • Initiated • Not Applicable
ReceiverBin	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the entity who filed an arbitration or compliance case. Available in version 62.0 and later.</p>
SenderBin	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the entity against which an arbitration or compliance case is filed. Available in version 62.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the disputed transaction. Possible values are:</p> <ul style="list-style-type: none"> • Submitted • Invalid • No longer disputed • Resolved
TransactionAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount involved in the transaction.</p>
TransactionCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique code that identifies the type of transaction.</p>
TransactionCurrencyCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique code associated with the currency used in this transaction.</p>
TransactionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date of the transaction.</p>
TransactionDescription	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the transaction.</p>
TransactionIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the transaction.</p>
TransactionsApiSearchResult	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The search result of the transactions API. Available in version 61.0 and later.</p>
TrxnApiAuthorizationResult	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The authorization information obtained from the transactions API. Available in version 61.0 and later.</p>
TrxnApiClrAndStlResult	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The clearing and settlement information obtained from the transactions API. Available in version 61.0 and later.</p>
TrxnAuthorizationIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier generated during the authorization phase of a transaction to verify the availability of sufficient funds in the cardholder's account to proceed with the transaction. Available in version 61.0 and later.</p>
TrxnClearingIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier assigned to a transaction during clearing and settlement process to track the transaction's progress and facilitate funds transfer between parties. Available in version 61.0 and later.</p>
ValidationOutcome	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the outcome of the validation rules run on the disputed transaction. Possible values are:</p> <ul style="list-style-type: none"> Automatic write-off Eligible Invalid
ValidationOutcomeReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the transaction's validation outcome. Available in version 60.0 and later.</p>

DisputeItemArbitration

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

Supported Calls

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

Special Access Rules

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that's claimed by a party in a disputed transaction.</p>

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the arbitration or compliance case.</p>
DisputeItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The Dispute Item assoiated with an arbitration or compliance case. This field is a relationship field.</p> <p>Relationship Name DisputeItem</p> <p>Relationship Type Master-detail</p> <p>Refers To DisputeItem (the master object)</p>
DisputeReasonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Dispute Reason associated with the disputed transaction for which an arbitration or compliance case is filed. This field is a relationship field.</p> <p>Relationship Name DisputeReason</p> <p>Refers To DisputeReason</p>
DocumentUploadStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the upload status of the document or an image related to the arbitration or compliance case.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • Failed • Unprocessed
ExternalCaseIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the arbitration or compliance case assigned to a disputed transaction by a dispute management system, such as Mastercom or Visa.</p>
IsEscalated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the pre-arbitration case was escalated (true) or not (false) to create an arbitration case. The default value is <code>false</code>.</p>
IsReasonCodeUpdated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the reason code for the disputed transaction was updated (true) or not (fasle) before filing the arbitration or compliance case. The default value is <code>false</code>.</p>
Memo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The memo content of the arbitration or compliance case.</p>
ReasonCodeUpdateReason	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description for the reason code update.</p>
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the role under which an entity filed the arbitration or compliance case.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Acquirer • Issuer
Status	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the arbitration or compliance case retrieved from a dispute management system.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of case filed for the transaction that's being disputed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Arbitration • Compliance • Pre-Arbitration • Pre-Compliance

Associated Objects

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

DisputeItemArbitrationChangeEvent on page 956

Change events are available for the object.

DisputeItemArbitrationFeed on page 960

Feed tracking is available for the object.

DisputeItemArbitrationHistory on page 968

History is available for tracked fields of the object.

DisputeItemArbitrationOwnerSharingRule on page 973

Sharing rules are available for the object.

DisputeItemArbitrationShare on page 976

Sharing is available for the object.

DisputeItemMerchantAlert

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AlertDeliveryStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the delivery status of the alert associated with an individual transaction in a batch of disputed transactions.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• Delivered• Undelivered• Failed• Ignored• Updated

Field	Details
AlertDlvrStatusDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the delivery status of the alert.</p>
AlertIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique identifier assigned to a merchant alert related to the transaction that's being disputed. The alert identifier is generated by a chargeback prevention system like Ethoca.</p>
DisputeItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The Dispute Item associated with the merchant alert. This field is a relationship field.</p> <p>Relationship Name DisputeItem</p> <p>Relationship Type Lookup</p> <p>Refers To DisputeItem</p>
DisputedTrxnBatchIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An unique identifier assigned to the request made by the issuer for submitting a group of disputed transactions. Each group of disputed transactions is called a batch. The batch identifier is generated by a chargeback prevention system like Ethoca.</p>
DisputedTrxnBatchStatus	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the batch of disputed transactions that includes this transaction. Possible values are:</p> <ul style="list-style-type: none"> • IN PROGRESS • PROCESSED
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the DisputeItem record.</p>
Outcome	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the outcome of the alert selected by the merchant. Possible values are:</p> <ul style="list-style-type: none"> • Resolved • Previously Refunded • Unresolved

Field	Details
	<ul style="list-style-type: none"> Not Found Other
OutcomeDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the alert outcome.</p>
OutcomeUpdateDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the merchant last updated the alert outcome of the transaction that's being disputed. The timestamp is represented in the ISO 8601 format.</p>
RefundStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the refund issued by the merchant in response to the customer's dispute alert.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Yes No Not Settled
Source	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the source of the merchant alert.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Ethoca <p>The default value is Ethoca.</p>

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of alert associated with the transaction that's being disputed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Confirmed Fraud Consumer Dispute

Associated Objects

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

[DisputeItemMerchantAlertChangeEvent on page 956](#)

Change events are available for the object.

[DisputeItemMerchantAlertFeed on page 960](#)

Feed tracking is available for the object.

[DisputeItemMerchantAlertHistory on page 968](#)

History is available for tracked fields of the object.

[DisputeItemMerchantAlertOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[DisputeItemMerchantAlertShare on page 976](#)

Sharing is available for the object.

DisputeItemChargeback

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

Supported Calls

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

Fields

Field	Details
ChargebackAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount claimed by the issuer using a chargeback for the disputed transaction. Available in version 62.0 and later.</p>
ChargebackAmountCurrency	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The currency in which the chargeback amount is credited to the cardholder. Available in version 62.0 and later.</p>
ChargebackCreatedData	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the chargeback was created for a disputed transaction. Available in version 62.0 and later.</p>
ChargebackIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the chargeback assigned by the dispute system.</p>
ChargebackReferenceNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique reference number that's associated with the chargeback process, enabling the issuer to track the chargeback throughout its lifecycle, including pre-arbitration case.</p>

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the chargeback request provided by the member or the entity filing the chargeback.</p>
DisputeItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The Dispute Item associated with the chargeback. This field is a relationship field.</p> <p>Relationship Name DisputeItem</p> <p>Relationship Type Master-detail</p> <p>Refers To DisputeItem (the master object)</p>
DisputeReasonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The dispute reason associated with the chargeback. This field is a relationship field.</p> <p>Relationship Name DisputeReason</p> <p>Relationship Type Lookup</p> <p>Refers To DisputeReason</p>
DocumentStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description The status of a document associated with the chargeback.
IsDocumentRequired	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether a supporting document is required (true) or not (false) for dispute resolution. The default value is <code>false</code> .
IsPartialChargeback	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the cardholder has disputed only a portion of the transaction amount (true) or not (false). The default value is <code>false</code> .
IsRefundReceived	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the cardholder received the expected refund (true) or not (false) for the chargeback. The default value is <code>false</code> .
RejectReason	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reason for rejecting the chargeback by the dispute system.
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p>Description Specifies the status of chargeback. Possible values are:</p> <ul style="list-style-type: none"> • Closed • Not Submitted • Rejected • Rejected By Merchant • Submitted
StatusUpdateDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the chargeback status was last updated. The timestamp is represented in the ISO 8601 format.</p>
TransactionSettlementDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the transaction was completed and the funds were transferred between the parties involved.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of chargeback based on the dispute reason. Possible values are:</p> <ul style="list-style-type: none"> • Chargeback • Second Presentment

Associated Objects

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

DisputeItemChargebackChangeEvent on page 956

Change events are available for the object.

DisputeItemChargebackFeed on page 960

Feed tracking is available for the object.

DisputeItemChargebackHistory on page 968

History is available for tracked fields of the object.

DisputeItemChargebackOwnerSharingRule on page 973

Sharing rules are available for the object.

DisputeItemChargebackShare on page 976

Sharing is available for the object.

DisputeReason

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

Supported Calls

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

Special Access Rules

Fields

Field	Details
CardType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of card used in the transaction that's being disputed. Possible values are:</p> <ul style="list-style-type: none"> • Credit Card • Debit Card • Prepaid Card
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The description of the reason.
IsActive	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether a reason code is active (true) or not (false).
	The default value is <code>false</code> .
IsDocumentRequired	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether supporting document is required (true) or not (false) for the reason code.
	The default value is <code>false</code> .
PaymentNetwork	Type
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Specifies the payment network that facilitates the exchange of funds between parties involved.
	Possible values are:
	<ul style="list-style-type: none"> • ACH • American Express • Diners • Mastercard • Visa • Zelle
ReasonCode	Type
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Specifies a unique code that identifies the primary reason for a disputed transaction.
	Possible values are:

Field	Details
	<ul style="list-style-type: none"> 4808 4834 4853 71
ReasonCodeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name associated with a reason code.</p>
ReasonCodeSubtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the subtype of the reason code.</p>
ReasonCodeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the reason code.</p>
ReasonCodeValidFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the validity of the reason code.</p>
ReasonCodeValidToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the validity of the reason code.</p>
ReasonSubcode	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies a unique subcode that classifies a disputed transaction within a specific reason code.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • 1 • 2 • 3 • 4 • 5 • 6 • 7
ReasonSubcodeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name associated with a reason subcode.</p>

Associated Objects

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

[DisputeReasonChangeEvent on page 956](#)

Change events are available for the object.

[DisputeReasonFeed on page 960](#)

Feed tracking is available for the object.

[DisputeReasonHistory on page 968](#)

History is available for tracked fields of the object.

[DisputeReasonOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[DisputeReasonShare on page 976](#)

Sharing is available for the object.

DisputeQueueJobRun

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

Supported Calls

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

Fields

Field	Details
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the job ran.</p>
FlowInterviewId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Flow Interview that's associated with the dispute queue job run. This field is a relationship field.</p> <p>Relationship Name FlowInterview</p> <p>Relationship Type Lookup</p> <p>Refers To FlowInterview</p>
JobRunInformation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The information about the job run, such as status, error message, and so on.</p>
QueueName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the name of the queue from where the claims are retrieved.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • AcquirerWorked • Closed • IssuerRepresentmentUnworked • IssuerWorked • Pending • PendingDocumentation • Rejects • SenderCaseFiling
RetrievedClaimCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of claims that were retrieved in the job.</p>
RetrievedPageCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of pages that were retrieved in the job.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the job.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • Failed • Started

Associated Objects

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

DisputeQueueJobRunChangeEvent on page 956

Change events are available for the object.

DisputeQueueJobRunFeed on page 960

Feed tracking is available for the object.

DisputeQueueJobRunHistory on page 968

History is available for tracked fields of the object.

DisputeQueueJobRunOwnerSharingRule on page 973

Sharing rules are available for the object.

DisputeQueueJobRunShare on page 976

Sharing is available for the object.

DisputeItemQueueResponse

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

Supported Calls

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

Fields

Field	Details
DisputeItemId	Type reference Properties Create, Filter, Group, Sort Description The Dispute Item that's associated with the queue response. This field is a relationship field. Relationship Name DisputeItem Relationship Type Master-detail Refers To DisputeItem (the master object)
DisputeQueueJobRunId	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	<p>Description The Dispute Queue Job Run that's associated with the dispute item queue response. This field is a relationship field.</p> <p>Relationship Name DisputeQueueJobRun</p> <p>Relationship Type Lookup</p> <p>Refers To DisputeQueueJobRun</p>
QueueName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the queue that's the source of the response.</p>
QueueResponse	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The dispute item claim details received from a queue.</p>
ResponseProcessingStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates whether the update received for a claim from the queue is processed (true) or not (false). Possible values are: <ul style="list-style-type: none"> • Completed • In Progress </p>

Associated Objects

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

DisputeItemQueueResponseChangeEvent on page 956

Change events are available for the object.

DisputeItemQueueResponseFeed on page 960

Feed tracking is available for the object.

DisputeItemQueueResponseHistory on page 968

History is available for tracked fields of the object.

DisputeItemQueueResponseOwnerSharingRule on page 973

Sharing rules are available for the object.

DisputeItemQueueResponseShare on page 976

Sharing is available for the object.

DistributorAuthorization

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the distributor's business account.</p>
AuthorizedInsuranceLineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The insurance line that the insurance company is authorized to sell.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description The ID of the contact associated with the producer.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this authorization is in effect.</p>
ExpirationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this authorization expires.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the authorization is active (true) or inactive (false). The default value is false.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LicenseId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The distributor's business license against which the distributor is authorized.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-number identifier for this distributor authorization.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The authorization status of the distributor. Possible values are:</p> <ul style="list-style-type: none"> • Appointed • Terminated
TerminationCause	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the termination of the distributor's authorization.</p>

Associated Objects

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

DistributorAuthorizationChangeEvent on page 956

Change events are available for the object in API version 62.0 and later.

DistributorAuthorizationFeed on page 960

Feed tracking is available for the object.

DistributorAuthorizationHistory on page 968

History is available for tracked fields of the object.

DistributorAuthorizationOwnerSharingRule on page 973

Sharing rules are available for the object.

DistributorAuthorizationShare on page 976

Sharing is available for the object.

DocChkItemValidatedTarget

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

Supported Calls

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

Fields

Field	Details
DocumentChecklistItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The document checklist item against which a target reference object is validated.</p> <p>This field is a relationship field.</p> <p>Relationship Name DocumentChecklistItem</p> <p>Relationship Type Lookup</p> <p>Refers To DocumentChecklistItem</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the validation of the target reference object is active (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the Document Checklist Item Validated Target record.</p>
TargetReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object validated against a document checklist item. This field is a polymorphic relationship field.</p> <p>Relationship Name TargetReferenceObject</p> <p>Relationship Type Lookup</p> <p>Refers To IdentityDocument, PartyProfile, PartyProfileAddress, PartyProfileRisk, PartyScreeningSummary</p>

Associated Objects

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

[DocChkItemValidatedTargetChangeEvent on page 956](#)

Change events are available for the object.

[DocChkItemValidatedTargetFeed on page 960](#)

Feed tracking is available for the object.

[DocChkItemValidatedTargetHistory on page 968](#)

History is available for tracked fields of the object.

[DocChkItemValidatedTargetOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[DocChkItemValidatedTargetShare on page 976](#)

Sharing is available for the object.

DocumentCategory

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

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The description for the document category.</p>
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The developer name of the document category.</p>
Language	<p>Type picklist</p>

Field	Details
	<p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The language of the document category.</p>
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The master label of the document category.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

DocumentCategoryDocumentType

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

Supported Calls

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

Fields

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

Field	Details
	Relationship Type
	Lookup
	Refers To
	DocumentType
Language	Type picklist
	Properties
	Filter, Group, Restricted picklist, Sort
	Description
	The language of the document category.
MasterLabel	Type string
	Properties
	Filter, Group, idLookup, Sort
	Description
	The label for the picklist value that appears in the UI.
NamespacePrefix	Type string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation.
	The namespace prefix can have one of the following values:
	<ul style="list-style-type: none"> In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. In organizations that are Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

DocumentChecklistItem

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

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Read only. The ID of the account the document checklist item belongs to. The value of the field is set internally using the ParentRecordId field.</p>
Comments	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Comments added when validating a target reference object against the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>
DocumentCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The document category related to the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud. This field is a relationship field.</p>
DocumentTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the document type for the document checklist item.</p>
Instruction	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description Instructions associated with the document checklist item.</p>
IsAccepted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the file has been accepted. The default value is False.</p>
IsFrozen	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the item can no longer be modified. The default value is False.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the document checklist item is required. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the document checklist item.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>
ParentRecordId	<p>Type master-detail reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Original parent object the document checklist item belonged to.</p>
ReceivedDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field is a relationship field.</p> <p>Relationship Name ReceivedDocument</p> <p>Relationship Type Lookup</p> <p>Refers To ReceivedDocument</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Uploaded document checklist item status.</p> <p>Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> Accepted New Pending Waived Not Verified Rejected <p>The default value is New.</p>
UploadedById	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Person who uploaded the file.</p>
ValidatedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user who validated the target reference object against the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>
ValidationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the target reference object was validated. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>
WhoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person that the uploaded documentation pertains to.</p>

Associated Objects

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

[DocumentChecklistItemChangeEvent on page 956](#)

Change events are available for the object.

[DocumentChecklistItemFeed](#)

Feed tracking is available for the object.

[DocumentChecklistItemHistory](#)

History is available for tracked fields of the object.

[DocumentChecklistItemOwnerSharingRule](#)

Sharing rules are available for the object.

[DocumentChecklistItemShare](#)

Sharing is available for the object.

DocumentType

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

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description for the document category.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p>

Field	Details
	<p> Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier for the document type in an external system. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the document type is active.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the document type.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The label for the picklist value that appears in the UI.</p>
MaximumFileSize	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the maximum file size in MB for each document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>

Field	Details
MaximumFileUploadCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the maximum number of file uploads allowed for a document category. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

FinancialAccount

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
BankerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who originated the financial account. This field is a relationship field.</p> <p>Relationship Name Banker</p> <p>Relationship Type Lookup</p> <p>Refers To Banker</p>
BranchUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The bank branch or financial institute to which the financial account is associated with. This field is a relationship field.</p> <p>Relationship Name BranchUnit</p> <p>Relationship Type Lookup</p> <p>Refers To BranchUnit</p>
ClosingDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial account was closed.</p>
CreditLimit	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The total credit limit available for the financial account.
DownPaymentAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	An initial up-front partial payment amount.
FinancialAccountNumber	Type string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The identifier of the financial account.
InsurancePaidYearToDate	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total amount of insurance premium paid in the current tax year.
InterestPaidYearToDate	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total amount of interest paid in the current tax year.
InterestRate	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The interest rate of the financial account.
InterestType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	<p>Specifies the type of interest. For example, fixed and variable.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Fixed • Variable
IsHeldAway	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether this financial account is owned externally (true) or in-house (false).</p>
	<p>The default value is <code>false</code>.</p>
IsOverdraftAllowed	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the financial account allows an overdraft (true) or not (false).</p>
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user referenced this record.</p>
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user viewed this record.</p>
MaturityDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The date when the financial account with a fixed term matures.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the financial account.</p>
OpeningDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial account was opened.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the financial account record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PaymentDueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the payment is due for the financial account.</p>
PrincipalAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The principal amount on the financial account.</p>
PrincipalPaidYearToDate	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount paid against the principal in the current tax year.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the financial account. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
PropertyTaxPaidYearToDate	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of property tax paid in the current tax year.</p>
RelatedFinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent of the financial account. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RelatedFinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
RenewalDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial account is due for renewal.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the financial account in an external system such as, a core banking system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the financial account. Possible values are:<ul style="list-style-type: none"> • Active • Closed • Delinquent • On Hold The default value is Active.</p>
Term	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The term of the financial account.</p>

Field	Details
TotalOutstandingAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total outstanding amount on the financial account.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of financial account.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Automotive Lease Automotive Loan Checking Credit Card Home Equity Line of Credit Investment Account Loan Mortgage Savings

Usage

Associated Objects

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

[FinancialAccountChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

FinancialAccountShare on page 976

Sharing is available for the object.

FinancialAccountAddress

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
ActiveFromDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from when the address is active for the financial account.
ActiveToDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from when the address stops being active for the financial account.
Address	Type address Properties Filter Description The address of the financial account.

Field	Details
City	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city related to a financial account's address.</p>
Country	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country related to a financial account's address.</p>
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial account related to an address. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
GeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the milestone location's latitude and longitude coordinates. Possible values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County

Field	Details
	<ul style="list-style-type: none"> • ExtendedZip—Extended Zip • NearAddress—Near Address • Neighborhood • State • Street • Unknown • Zip
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Latitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The latitude related to a financial account's address.</p>
Longitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The longitude related to a financial account's address.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of this record.</p>
PostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code related to a financial account's address.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of this record in an external system.</p>
State	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state related to a financial account's address.</p>
Street	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street related to a financial account's address.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the address type of the financial account. Possible values are:</p> <ul style="list-style-type: none"> • Billing Address • Communication Address • Statement Address

Associated Objects

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

[FinancialAccountAddressChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountAddressFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountAddressHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountAddressOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialAccountAddressShare on page 976](#)

Sharing is available for the object.

FinancialAccountBalance

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The balance in the financial account.</p>
BalanceAsOfDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The timestamp for when the balance was last retrieved from an external data source.</p>
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial account related to the balance. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of this record in an external system.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted Picklist, Sort, Update</p> <p>Description Specifies the type of balance in the financial account. Possible values are:</p> <ul style="list-style-type: none"> • Available Balance • Available Credit • Balance Last Statement • Cash Balance • Current Posted Balance • Lease Balance • Minimum Payment • Pending Deposit • Pending Withdrawal • Principal Balance • Total Balance

Associated Objects

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

[FinancialAccountBalanceChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountBalanceFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountBalanceHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountBalanceOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialAccountBalanceShare on page 976](#)

Sharing is available for the object.

FinancialAccountFee

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that is charged for the request.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The date until when the applicable fee is charged on the financial account.</p>
FinancialAccountId	Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	<p>The financial account to which the fee is charged.</p>
	<p>This field is a relationship field.</p>
	Relationship Name
	FinancialAccount
	Relationship Type
	Lookup
	Refers To
	FinancialAccount
Frequency	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The frequency at which the applicable fee is charged on the financial account.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Monthly • One Time • Yearly
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user referenced this record.</p>
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
Rate	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount in percentage that is charged for the request.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the financial account fee in an external system.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from when the applicable fee is charged on the financial account.</p>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the financial account fee, such as stop payment fee, new check book fee, duplicate card fee, and more.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Duplicate Card Fee • New Cheque Book Fee • Stop Payment Fee <p>The default value is Stop Payment Fee.</p>

Associated Objects

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

[FinancialAccountFeeChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountFeeFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountFeeHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountFeeOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialAccountFeeShare on page 976](#)

Sharing is available for the object.

FinancialAccountParty

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account related to a financial account. This field is a relationship field.</p> <p>Relationship Name Account</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Account</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact related to the financial account. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial account associated with the party. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
IsRoleActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the party role is active (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the role of the party in relation to a financial account.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Beneficiary • Driver • Leasee • Owner
RoleEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party, such as an organization or contact relinquished the role.</p>
RoleStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party, such as an organization or contact assumed the role.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of this record in an external system.</p>

Associated Objects

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

[FinancialAccountPartyChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountPartyFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountPartyHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountPartyOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

FinancialAccountPartyShare on page 976

Sharing is available for the object.

FinlAcctPtyFinlAsset

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AssociationEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the party asset's association ends with the financial account.
AssociationStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the party asset was associated with the financial account.
AssociationType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of association between the financial account and the party asset. Possible values are: <ul style="list-style-type: none">• Collateral• Trade In

Field	Details
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The financial account associated with the party asset. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this record.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyFinancialAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party asset associated with the financial account. This field is a relationship field.</p> <p>Relationship Name PartyFinancialAsset</p> <p>Relationship Type Lookup</p> <p>Refers To PartyFinancialAsset</p>
PledgedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The monetary value of the asset pledged as the collateral for the associated financial account.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the financial account party asset in an external system.</p>

Associated Objects

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

[FinlAcctPtyFinlAssetChangeEvent on page 956](#)

Change events are available for the object.

[FinlAcctPtyFinlAssetFeed on page 960](#)

Feed tracking is available for the object.

[FinlAcctPtyFinlAssetHistory on page 968](#)

History is available for tracked fields of the object.

[FinlAcctPtyFinlAssetOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinlAcctPtyFinlAssetShare on page 976](#)

Sharing is available for the object.

FinancialAccountStatement

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the financial account statement.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Indicates the end date of the financial account statement period.</p>

Field	Details
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial account associated with the financial account statement. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The unique identifier of the financial account statement in an external system.</p>

Field	Details
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Indicates the start date of the financial account statement period.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the statement type. Possible values are: <ul style="list-style-type: none"> • Account Closure Statement • Balance Statement • Periodic Statement </p>
Url	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL of the statement attachment or file.</p>

Associated Objects

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

[FinancialAccountStatementChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountStatementFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountStatementHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountStatementOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialAccountStatementShare on page 976](#)

Sharing is available for the object.

FinancialAccountTransaction

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The transaction amount.</p>
DebitCreditIndicator	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the transaction is of type Credit or Debit. For example, money deposited to a Checking or Savings account is of type Credit, and money withdrawn from a deposit account is of type Debit. Possible values are:</p> <ul style="list-style-type: none">• Credit• Debit
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction description.</p>

Field	Details
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial account related to the transaction. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this record.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PostedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the transaction was posted to the financial account.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the financial account transaction in an external system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the transaction. Possible values are: <ul style="list-style-type: none"> Booked Pending </p>
SubType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the sub type of the transaction.</p>
TransactionCode	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the transaction.</p>
TransactionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time of the transaction.</p>
TransactionIdentifier	<p>Type text</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the transaction.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the transaction.</p>

Associated Objects

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

[FinancialAccountTransactionChangeEvent on page 956](#)

Change events are available for the object.

[FinancialAccountTransactionFeed on page 960](#)

Feed tracking is available for the object.

[FinancialAccountTransactionHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialAccountTransactionOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialAccountTransactionShare on page 976](#)

Sharing is available for the object.

FinancialDeal

Represents the deal that the financial institution is working on. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account ID of the customer who engaged the financial institution in this deal. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
CloseProbability	<p>Type percent</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The probability of the deal being successfully closed.</p>
ConfidentialityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the level of confidentiality of the information that's recorded in the financial deal. Possible values are:</p> <ul style="list-style-type: none">• Confidential

Field	Details
	<ul style="list-style-type: none"> Public
ConflictStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the conflict clearance for the financial deal.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Approved Declined
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the deal.</p>
ExpectedCloseDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the deal is expected to close.</p>
FinancialDealCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique code that identifies the deal.</p>
FinancialDealType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the deal.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Advisory

Field	Details
	<ul style="list-style-type: none"> • Capital Raising • Debt Capital Market • Initial Public Offering • Mergers and Acquisitions • Secondary Offering
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MandatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial deal was mandated.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the financial deal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record.</p>

Field	Details
	<p>This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentFinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent financial deal. This is a relationship field.</p> <p>Relationship Name ParentFinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
ReceivedFee	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total fee received by the financial institution until the current date.</p>
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The role that the financial institution plays in this deal. Possible values are:</p> <ul style="list-style-type: none"> • Advisor • Bookrunner • Syndication Agent

Field	Details
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the stage of the deal. Possible values are:</p> <ul style="list-style-type: none"> • Closed • Execution • Mandate • Pitch
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the deal. Possible values are:</p> <ul style="list-style-type: none"> • Closed • On Hold • Open
TotalExpectedFee	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total fee expected by the financial institution until the current date.</p>
TotalExpense	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total expense incurred for the financial deal until the current date.</p>
TransactionValue	<p>Type currency</p>

Field	Details
Properties	Create, Filter, Nillable, Sort, Update
Description	The total transaction value of the financial deal.

Associated Objects

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

[FinancialDealChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialDealOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialDealShare on page 976](#)

Sharing is available for the object.

FinancialDealAsset

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

Supported Calls

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

Fields

Field	Details
Address	<p>Type</p> <p>address</p> <p>Properties</p> <p>Filter, Nillable</p> <p>Description</p> <p>The location of the asset.</p>

Field	Details
	<p>This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The asset involved in the financial deal.</p> <p>This is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
AssetType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of asset.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Office Space • Residential Space
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The financial deal associated with the financial deal asset record.</p> <p>This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the financial deal asset record.</p>
UnitCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of units.</p>
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the asset. This is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Relationship Type Lookup</p>

Field	Details
Refers To	UnitOfMeasure

Associated Objects

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

[FinancialDealAssetChangeEvent](#)

Change events are available for the object.

[FinancialDealAssetFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealAssetHistory on page 968](#)

History is available for tracked fields of the object.

FinancialDealBid

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

Supported Calls

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

Fields

Field	Details
BidAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that the financial deal party is willing to pay for the bid.</p>
BidDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the bid has been placed by the financial deal party.</p>

Field	Details
BidRound	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The bidding round in which the bid has been placed by the financial deal party.</p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The financial deal associated with the financial deal bid record. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
FinancialDealPartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial deal party who's making the bid. This is a relationship field.</p> <p>Relationship Name FinancialDealParty</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDealParty</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the financial deal bid record.</p>

Associated Objects

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

[FinancialDealBidChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealBidFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealBidHistory on page 968](#)

History is available for tracked fields of the object.

FinancialDealInteraction

Represents a junction between an interaction and a financial deal. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description Notes about the financial deal associated with the interaction.</p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial deal associated with the interaction. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
InteractionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The interaction associated with the financial deal interaction record. This is a relationship field.</p> <p>Relationship Name Interaction</p> <p>Relationship Type Lookup</p> <p>Refers To Interaction</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the financial deal interaction record.</p>

Associated Objects

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

[FinancialDealInteractionChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealInteractionFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealInteractionHistory on page 968](#)

History is available for tracked fields of the object.

FinancialDealParty

Represents the parties, such as partners and competitors, that are involved in the deal. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact ID of the party. This is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
PartyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the party. Possible values are: <ul style="list-style-type: none"> • Company • Individual </p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The deal that's shared with the participant. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Aggregate, Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastStageChangeDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date of the last change made to the <code>Stage</code> field on this financial deal party record. This field is available in API version 54.0.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party that's involved in the deal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account ID of the party. This is a relationship field.</p> <p>Relationship Name Party</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
PartyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The party's role in the deal. Possible values are:<ul style="list-style-type: none"> • Competitor • Partner • Syndicate </p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The current stage of the party involved with the financial deal. Possible values are:<ul style="list-style-type: none"> • Confidential Information Memorandum Sent • Declined • Indication of Interest Sent • Letter of Intent Sent • Non-Disclosure Agreement Signed </p>

Field	Details
	<ul style="list-style-type: none"> Teaser Sent

Associated Objects

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

[FinancialDealPartyChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealPartyFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealPartyHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialDealPartyOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialDealPartyShare on page 976](#)

Sharing is available for the object.

FinancialDealParticipant

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

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes about the deal participant.</p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The deal that's shared with the participant. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the deal participant is active. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to this record.</p>

Field	Details
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The user or group that the deal is shared with. This is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The role assigned to the participant. This is a relationship field.</p> <p>Relationship Name ParticipantRole</p> <p>Relationship Type Lookup</p> <p>Refers To ParticipantRole</p>

Associated Objects

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

[FinancialDealParticipantChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealParticipantFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealParticipantHistory on page 968](#)

History is available for tracked fields of the object.

FinancialDealProduct

Represents the products (services) offered by the bank in the deal. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
Fee	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The fee charged by the bank for the product</p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial deal that the product or service is associated with. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product (service) provided by the bank.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product (service) provided by the bank in the deal. This is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Associated Objects

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

[FinancialDealProductChangeEvent on page 956](#)

Change events are available for the object.

[FinancialDealProductFeed on page 960](#)

Feed tracking is available for the object.

[FinancialDealProductHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialDealProductOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialDealProductShare on page 976](#)

Sharing is available for the object.

FinancialGoal

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

Supported Calls

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

Fields

Field	Details
ActualAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The current amount saved toward the goal.</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the category of the goal. This field is available in API version 60.0 and later. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> Expenditure Capital
CompletionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial goal is reached.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the financial goal.</p>
EstimatedSuccessPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The estimated success percentage of the financial goal. This field is available in API version 60.0 and later.</p>
FinancialPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record.</p> <p>The ID of the financial plan associated with the financial goal. This field is available in API version 60.0 and later.</p> <p>Relationship Name FinancialPlan</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To FinancialPlan</p>
InitialAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The initial amount saved toward the goal.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the financial goal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Priority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the priority of the goal. Possible values are:</p> <ul style="list-style-type: none"> • HIGH • LOW • MEDIUM
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier for the financial goal in an external system.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the financial goal.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the financial goal. Possible values are:</p> <ul style="list-style-type: none"> • COMPLETED

Field	Details
	<ul style="list-style-type: none"> IN_PROGRESS NOT_STARTED
TargetAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount required to reach the goal.</p>
TargetDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the financial goal is expected to be reached.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of financial goal. Possible values are:</p> <ul style="list-style-type: none"> Education Emergency Home Other Pay off Debt Retirement Vacation Vehicle
WithdrawalFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The frequency at which the money is withdrawn. This field is available in API version 60.0 and later.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Monthly • Weekly • Annually

Associated Objects

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

[financialgoalChangeEvent on page 956](#)

Change events are available for the object.

[FinancialGoalHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialGoalOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FinancialGoalShare on page 976](#)

Sharing is available for the object.

FinancialGoalFunding

The financial goal of an individual or person account that requires funding. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount contributed to the financial goal.</p>
FinancialGoalId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p>
	<p>Description The financial goal of an individual or person account that requires funding. This field is a relationship field.</p>
	<p>Relationship Name FinancialGoal</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To FinancialGoal</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>

Associated Objects

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

[FinancialGoalFundingChangeEvent on page 956](#)

Change events are available for the object.

[FinancialGoalParty](#)

Represents a junction between the financial goal and the person account. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account to which the financial goal party is associated. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
FinancialGoalId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial goal to which the financial goal party is associated. This field is a relationship field.</p> <p>Relationship Name FinancialGoal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialGoal</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the financial goal party.</p>

FinancialPlan

Represents a financial plan for a person account. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The household to which the financial plan is associated. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the financial plan.</p>
EstimatedSuccessPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The success percentage that's estimated for the financial plan.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the financial plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier for the financial plan in an external system.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the financial plan.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the financial plan. Possible values are:</p> <ul style="list-style-type: none"> • Completed

Field	Details
	<ul style="list-style-type: none"> • InProgress—In Progress • NotStarted—Not Started
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of financial plan. Possible values are:</p> <ul style="list-style-type: none"> • Education • Other • Retirement

FinAssetPortfolioTgtAlloc

Stores target asset allocation for a financial account, person account, or household. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
ActualAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the actual amount of all assets.</p>
ActualLastUpdated	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the last updated time of the Actual Percent.</p>

Field	Details
ActualPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the actual allocation percentage of all assets.</p>
AssetClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Defines the major category of the asset type.</p>
AssetSubclass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Defines the subclass of the asset class.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Describes the asset allocation.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the asset portfolio target allocation.</p>
NegativeTolerance	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Represents the allowed amount the actual allocation can be below the target, by rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description This field is a relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To User</p>
PositiveTolerance	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Represents the allowed amount the actual allocation can be above the target, by rule.</p>
Sector	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Represents a group of stocks that have a lot in common.</p>
TargetId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Associates the target object with the asset allocation. This field is a polymorphic relationship field.</p>
	<p>Relationship Name Target</p> <p>Refers To Account, FinancialAccount</p>
TargetPercent	<p>Type percent</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Represents the target allocation for the asset classification category.</p>
VarianceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the difference between the Target and Actual Amount.</p>
VariancePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the difference between the Target Percent and Actual Percent.</p>

Associated Objects

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

[FinAssetPortfolioTgtAllocChangeEvent on page 956](#)

Change events are available for the object.

[FinAssetPortfolioTgtAllocFeed on page 960](#)

Feed tracking is available for the object.

[FinAssetPortfolioTgtAllocHistory on page 968](#)

History is available for tracked fields of the object.

FinAssetPortfolioTgtAllocShare on page 976

Sharing is available for the object.

FinancialSecurity

Represents information about a financial security instrument, such as stocks and bonds. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AnnualHigh	Type currency Properties Filter, Nillable, Sort Description Highest price in the last 52 weeks.
AnnualLow	Type currency Properties Filter, Nillable, Sort Description Lowest price in the last 52 weeks.
AssetClass	Type picklist Properties Filter, Group, Nillable, Sort Description Specifies the asset class.

Field	Details
AssetSubclass	Type picklist Properties Filter, Group, Nillable, Sort Description Specifies the subclass of the Equities asset class.
ClosePrice	Type currency Properties Filter, Nillable, Sort Description The last price when a security trades during a regular trading day.
CurrencyIsoCode	Type picklist Properties Filter, Sort Description ISO code of the currency.
EarningsPerShare	Type double Properties Filter, Nillable, Sort Description Company's net income divided by its outstanding shares of common stock.
EquityCategory	Type picklist Properties Filter, Group, Nillable, Sort Description Specifies the market capitalization and investing style.
ExDividendDate	Type date Properties Filter, Group, Nillable, Sort Description Trading date on (and after) where the dividend isn't owed to a new buyer.

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
MarketCap	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total value of a company's outstanding shares of stock.</p>
MarketValue	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The current market value of the securities.</p>
MarketValueDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the market value was recorded.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The name that uniquely identifies the securities.</p>

Field	Details
OpenPrice	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Price when the security first trades at the opening of the day.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PeRatio	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Price-Earnings Ratio of the security.</p>
ProjectedDividend	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Projected dividend payment.</p>
ProjectedDividendYield	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Projected dividend payment divided by the current stock price.</p>

Field	Details
Sector	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Group of related or common stocks.</p>
SecurityIdentifier	<p>Type external lookup</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The unique identifier of the financial security.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The unique identifier of the financial security in an external system.</p>
StockExchange	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Exchange on which the securities are traded.</p>
Symbol	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description A ticker symbol that is used to uniquely identify the publicly traded securities in a stock exchange.</p>
Volume	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The amount of a security to trade during a specific period of time.</p>

Associated Objects

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

[FinancialSecurityChangeEvent on page 956](#)

Change events are available for the object.

[FinancialSecurityFeed on page 960](#)

Feed tracking is available for the object.

[FinancialSecurityHistory on page 968](#)

History is available for tracked fields of the object.

[FinancialSecurityShare on page 976](#)

Sharing is available for the object.

[FinclDealInteractionSummary](#)

Represents a junction between an interaction summary and a financial deal. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Notes about the financial deal associated with the interaction summary.</p>
FinancialDealId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The financial deal associated with the interaction summary. This is a relationship field.</p> <p>Relationship Name FinancialDeal</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal</p>
InteractionSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The interaction summary associated with the financial deal interaction summary record. This is a relationship field.</p> <p>Relationship Name InteractionSummary</p> <p>Relationship Type Lookup</p> <p>Refers To InteractionSummary</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
Properties	Autonumber, Defaulted on create, Filter, idLookup, Sort
Description	The name of the financial deal interaction summary record.

Associated Objects

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

[FinlDealInteractionSummaryChangeEvent on page 956](#)

Change events are available for the object.

[FinlDealInteractionSummaryFeed on page 960](#)

Feed tracking is available for the object.

[FinlDealInteractionSummaryHistory on page 968](#)

History is available for tracked fields of the object.

FlowOrchestrationInstRelaObj

Represents a junction between a flow orchestration instance and a related object. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
FlowOrchestrationInstanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The run-time instance of an orchestration.</p> <p>This field is a relationship field.</p> <p>Relationship Name FlowOrchestrationInstance</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To FlowOrchestrationInstance</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the Flow orchestration instance related record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PntFlowOrchstrtnInstRelaObjId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent flow orchestration instance associated with this record. This field is a relationship field.</p> <p>Relationship Name PntFlowOrchstrtnInstRelaObj</p> <p>Relationship Type Lookup</p> <p>Refers To FlowOrchestrationInstRelaObj</p>
RelatedObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The object for which the flow orchestration instance run was initiated. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedObject</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationForm, PartyProfile</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the orchestration run. Possible values are:</p> <ul style="list-style-type: none"> Completed FinishedWithErrors—Finished with errors FixExceptions—Fix Exceptions InProgress—In Progress Restarted

Associated Objects

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

[FlowOrchestrationInstRelaObjChangeEvent on page 956](#)

Change events are available for the object.

[FlowOrchestrationInstRelaObjFeed on page 960](#)

Feed tracking is available for the object.

[FlowOrchestrationInstRelaObjHistory on page 968](#)

History is available for tracked fields of the object.

[FlowOrchestrationInstRelaObjOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[FlowOrchestrationInstRelaObjShare on page 976](#)

Sharing is available for the object.

GroupCensus

Represents a snapshot of statistics about eligible members (employees or members) of a group (employer or association) and their legal dependents. Use this entity in quoting, rating, and the subsequent enrollment process. Child object of employer or group Account. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Group account associated with the census.</p> <p>This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>

Field	Details
EffectiveEndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Effective end date of the census.</p>
EffectiveStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Effective start date of the census.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description External ID used to identify the group census in search. Used as a cross reference field if the group census is externally imported.</p>
FullTimeMemberCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of full-time members.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description
	The most recent date on which a user viewed this record
LeadId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Lead associated with the census.
	This is a relationship field.
	Relationship Name
	Lead
	Relationship Type
	Lookup
	Refers To
	Lead
MbrWithMoreThan1ChldCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of members who have one or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithMoreThan2ChldCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of members who have two or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithoutDependentCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of single members who haven't declared any dependents for plan enrollment.

Field	Details
MemberOptOutCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have opted out of plan enrollment and don't want to participate in the employer's benefits program.</p>
MemberWithDependentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have dependents and no spouse.</p>
MemberWithOneChildCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have only one child as a dependent. Use in rating during quote and contract.</p>
MemberWithSpouseCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have a spouse and no dependents.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the census.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the user who currently owns this account. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartTimeMemberCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of part-time members.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system of the census.</p>
SourceSystemType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the source system type. Possible values are: <ul style="list-style-type: none"> • External • User </p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the census.</p>

Field	Details
	Possible values are:
	<ul style="list-style-type: none"> • Active • Draft • Inactive
TotalDependents	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of dependents.
TotalMemberPlusDependent	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of members and dependents.
TotalMembers	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of members.
Type	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the stage this census is mapped to.
	Possible values are:
	<ul style="list-style-type: none"> • Enrollment • Lead • Quote • System
UsageType	Type picklist

Field	Details
Properties	Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
Description	<p>Internal field. Specifies the application using the group census to populate data.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Insurance <p>The default value is 'Insurance'.</p>

Associated Objects

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

[GroupCensusChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[GroupCensusFeed on page 960](#)

Feed tracking is available for the object.

[GroupCensusHistory on page 968](#)

History is available for tracked fields of the object.

[GroupCensusOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[GroupCensusShare on page 976](#)

Sharing is available for the object.

GroupCensusMember

Represents personal information about a member, for example employee or association member, or their dependents. GroupCensusMember is used to estimate the insurance plan cost for the group. This object is also used in the enrollment process to retrieve the member and dependent details. Child object of GroupCensus. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type</p> <p>reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person account associated with the census member. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Address	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The census member's address.</p>
AnnualEligibleSalary	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The census member's annual eligible salary, which is used to determine life insurance coverage.</p>
Birthdate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The census member's birthdate.</p>
City	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city detail for the address.</p>

Field	Details
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact associated with the census member. This is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
Country	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country detail for the address.</p>
DependentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of the census member's dependents. Children, parents, and parents-in-law are included in the number of dependents. Spouse isn't included in the number of dependents.</p>
Email	<p>Type email</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The census member's email address.</p>
FirstName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The census member's first name.</p>
	<p>Type double</p>
	<p>Properties Create, Filter, Nullable, Sort, Update</p>
	<p>Description Census member's hours divided by the employer's hours for a full-time work week. 1 is equal to full-time hours, 0.5 is 50% of the full-time equivalent.</p>
	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nullable, Sort, Update</p>
	<p>Description The census member's gender.</p>
	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p>
	<p>Description Accuracy level of the geocode for the address.</p>
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The group census associated with the member. This is a relationship field.</p> <p>Relationship Name GroupCensus</p> <p>Relationship Type Lookup</p> <p>Refers To GroupCensus</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group class associated with the census member. This is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Relationship Type Lookup</p> <p>Refers To GroupClass</p>
IsOptOutAllPlans	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the census member has opted out of all plans. Used to calculate OptOutCount for GroupCensus when RelationshipType is 'Self'. The default value is 'false'.</p>
IsPortalUser	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the census member is created as a portal user.</p>

Field	Details
	<p>The default value is 'false'.</p>
JoinDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The census member's hire date.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Lastname	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The census member's last name.</p>
Latitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address.</p>
Longitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	Used with Latitude to specify the precise geolocation of the address.
MemberKey	Type
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The hash key that's used for identifying duplicate group census member records. By default, the hash key is a combination of First Name, Last Name, and Email ID.
MemberType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Type of member.
Name	Type
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the census member.
OptOutPlanTypes	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Update
	Description
	Specifies the plan types the census member opts out of.
	Possible values are:
	<ul style="list-style-type: none"> • Dental • Life • Medical • Medical Savings Account • Retirement • Vision
PhoneNumber	Type
	phone

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The census member's phone number.</p>
PolicyStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The policy's start date.</p>
PostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The postal code for the address.</p>
PrimaryGroupCensusMemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The primary group census member associated with the census member. This is a relationship field.</p> <p>Relationship Name PrimaryGroupCensusMember</p> <p>Relationship Type Lookup</p> <p>Refers To GroupCensusMember</p>
PrimaryMemberCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the category of the primary census member.</p>

Field	Details
PrimaryMemberSource	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description External identifier of the primary member. Maximum size is 255 characters.</p>
RelationshipToPrimaryMember	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The census member's relationship to the primary member.</p>
SmokerStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the smoking status of the user</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Source System external ID of the group census member.</p>
State	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state detail for the address.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the group census member.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • Incompleted • Not Determined
Street	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street detail for the address.</p>

Associated Objects

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

[GroupCensusMemberChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[GroupCensusMemberFeed on page 960](#)

Feed tracking is available for the object.

[GroupCensusMemberHistory on page 968](#)

History is available for tracked fields of the object.

GroupCensusMemberPlan

Represents the association of GroupCensusMember and ContractGroupPlan. Use this entity when census data includes previous member enrollment plan details and new member plan details. You can populate GroupCensusMemberPlan by reading the enrollment census in the enrollment services before creating insurance policies. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
ContractGroupPlanId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contract group plan associated with the group census member plan. This is a relationship field.</p> <p>Relationship Name ContractGroupPlan</p> <p>Relationship Type Lookup</p> <p>Refers To ContractGroupPlan</p>
GroupCensusMemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group census member associated with the group census member plan. This is a relationship field.</p> <p>Relationship Name GroupCensusMember</p> <p>Relationship Type Lookup</p> <p>Refers To GroupCensusMember</p>
EnrollmentStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted</p> <p>Description The status of the enrollment, that is, the policy creation for a census member and their corresponding plan. Possible values are: <ul style="list-style-type: none"> Completed Failed To Be Started The default value is To Be Started.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the group census member plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Default on create, Filter, Group, Sort, Update</p> <p>Description The owner associated with the group census member plan. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

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

GroupCensusMemberPlanChangeEvent on page 956

Change events are available for the object in API version 62.0 and later.

GroupCensusMemberPlanFeed on page 960

Feed tracking is available for the object.

GroupCensusMemberPlanHistory on page 968

History is available for tracked fields of the object.

GroupClass

Represents the classification of group members that receive similar benefits. Example classes include executives, union, and office workers. Child object of employer or group Account. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the related account record. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class category the group class belongs to.</p>

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Code for the group class.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the group class.</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective end date of the group class.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective start date of the group class.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the group class.</p>
ParentGroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The parent group class associated with the group class. This is a relationship field.</p> <p>Relationship Name ParentGroupClass</p> <p>Relationship Type Lookup</p> <p>Refers To GroupClass</p>
UsageType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are:</p> <ul style="list-style-type: none"> • Insurance <p>The default value is 'Insurance'.</p>

Associated Objects

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

GroupClassChangeEvent on page 956

Change events are available for the object in API version 62.0 and later.

GroupClassHistory on page 968

History is available for tracked fields of the object.

GroupClassOwnerSharingRule on page 973

Sharing rules are available for the object.

GroupClassShare on page 976

Sharing is available for the object.

GroupClassContribution

Represents employer or group contributions for GroupClass members and their dependents on a per product category such as medical, dental, or vision. Child object of GroupClass. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The employer's contribution currency amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependents.</p>
ContractGroupPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contract group plan associated with the group class contribution. This is a relationship field.</p> <p>Relationship Name ContractGroupPlan</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To ContractGroupPlan</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective end date of the group class contribution.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective start date of the group class contribution.</p>
GroupBenefitProductCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the group benefit product category.</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The group class associated with the group class contribution. This is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Relationship Type Lookup</p> <p>Refers To GroupClass</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
MemberType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the member type. Possible values are:<ul style="list-style-type: none"> • Dependent • Subscriber </p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the group class contribution.</p>
Percentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The employer's contribution percentage amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependent.</p>
Type	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description Specifies the contribution type. Possible values are:</p> <ul style="list-style-type: none"> • Amount • Percentage

Associated Objects

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

[GroupClassContributionChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[GroupClassContributionHistory on page 968](#)

History is available for tracked fields of the object.

GrpCensusGrpClassSummary

Represents a junction between group census and group class to get statistics about the group class members for the associated group census.

Supported Calls

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

Fields

Field	Details
FullTimeMemberCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of full-time members.</p>
GroupCensusId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The group census associated with the record. This field is a relationship field.</p> <p>Relationship Name GroupCensus</p> <p>Relationship Type Master-detail</p> <p>Refers To GroupCensus (the master object)</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The group class associated with the record. This field is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Refers To GroupClass</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
MbrWithMoreThan1ChldCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have one or more children as dependents. Use in tier-based rating during quote and contract.</p>
MbrWithMoreThan2ChldCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have two or more children as dependents. Use in tier-based rating during quote and contract.</p>
MbrWithoutDependentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of single members who haven't declared any dependents for plan enrollment.</p>
MemberOptOutCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have opted out of plan enrollment and don't want to participate in the employer's benefits program.</p>
MemberWithDependentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of members who have dependents and no spouse.</p>
MemberWithOneChildCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description Number of members who have only one child as a dependent. Use in rating during quote and contract.
MemberWithSpouseCount	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number of members who have a spouse and no dependents.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the census.
PartTimeMemberCount	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number of part-time members.
TotalDependents	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number of dependents.
TotalMemberPlusDependent	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number of members and dependents.
TotalMembers	Type int

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Number of members.</p>

Associated Objects

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

[GrpCensus](#)[GrpClassSummary](#)[History](#) on page 968

History is available for tracked fields of the object.

[IdentityDocument](#)

Represents information about documents used to identify Financial Services Cloud clients.

Supported Calls

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

Fields

Field	Details
ExpirationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the document expires.</p>
IdDocumentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of the document that's used to verify the client's identity.</p>
IssueDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the document was issued.</p>
IssuingAuthority	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The authority that issued the document.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the document.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created this record.</p>

Field	Details
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile associated with this record. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
RelatedLegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the legal entity related to this document.</p>
VerifiedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the person who verified this document.</p>
VerifiedOn	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date when this document was verified.</p>

Associated Objects

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

[IdentityDocumentChangeEvent \(API version 61.0\)](#)

Change events are available for the object.

IndexRate

Represents a base rate that's defined by an authority. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the rate is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the authority defining the index rate.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the index rate record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Rate	<p>Type percent</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The index rate as defined by the authority.</p>
ValidEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the rate.</p>
ValidStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the rate.</p>

Associated Objects

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

[indexrateChangeEvent on page 956](#)

Change events are available for the object.

IndexRateFeed on page 960

Feed tracking is available for the object.

IndexRateHistory on page 968

History is available for tracked fields of the object.

IndexRateShare on page 976

Sharing is available for the object.

InfoAuthorizationRequest

Tracks a request for authorization on a Data Use Purpose. For example, consent request to share the documents required to open a financial account and share loan rate lock disclosure to the external customer. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
CommunicationType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The medium of which this request was sent.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Email • Mail • Paper • Phone • Web <p>The default value is 'Paper'.</p>
ConsenterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external (communities) account who is consenting to this request.</p> <p>This is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Consenter</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, User</p>
DataUsePurposeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Reference to the purpose of this request. This is a relationship field.</p> <p>Relationship Name DataUsePurpose</p> <p>Relationship Type Lookup</p> <p>Refers To DataUsePurpose</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expiration date of this request.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Locale	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The locale of the request (used to find Auth Form Texts that match the locale).</p>
MultipartyInfoAuthRequestId	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the related multiparty info authorization request record. This is a relationship field.</p> <p>Relationship Name MultipartyInfoAuthRequest</p> <p>Relationship Type Lookup</p> <p>Refers To MultipartyInfoAuthRequest</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the info authorization request record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PertainsToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The person to whom this request pertains. This is a polymorphic relationship field.</p> <p>Relationship Name PertainsTo</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, User</p>
RequestedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date time that this request was sent.</p>
RequesterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party that initiated the request. This is a polymorphic relationship field.</p> <p>Relationship Name Requester</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, User</p>

Field	Details
ResponseStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The consentee's response to this request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • New • Rejected • Seen • Signed <p>The default value is 'New'.</p>
SourceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record from which this consent request is created.</p> <p>This is a relationship field.</p> <p>Relationship Name SourceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task</p>

Associated Objects

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

[InfoAuthorizationRequestChangeEvent on page 956](#)

Change events are available for the object.

[InfoAuthorizationRequestFeed on page 960](#)

Feed tracking is available for the object.

[InfoAuthorizationRequestHistory on page 968](#)

History is available for tracked fields of the object.

[InfoAuthorizationRequestShare on page 976](#)

Sharing is available for the object.

InfoAuthRequestForm

Tracks the individual Authorization Form Texts that belong to an Authorization Request. For example, consent on GDPR privacy policy document and consent on mortgage loan rate lock fee document. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AuthorizationFormTextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A link to the Authorization Form Text to which this request is related. This is a relationship field.</p> <p>Relationship Name AuthorizationFormText</p> <p>Relationship Type Lookup</p> <p>Refers To AuthorizationFormText</p>
InfoAuthorizationRequestId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The Information Authorization Request to which this record is related. This is a relationship field.</p> <p>Relationship Name InfoAuthorizationRequest</p> <p>Relationship Type Lookup</p> <p>Refers To InfoAuthorizationRequest</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LatestAuthFormConsentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The most recent response from the consenter. This is a relationship field.</p> <p>Relationship Name LatestAuthFormConsent</p> <p>Relationship Type Lookup</p> <p>Refers To AuthorizationFormConsent</p>

Field	Details
LatestResponseDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The time of the latest response from the consenter.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the info authorization request record.</p>
ResponseStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The response from the latest Authorization Form Consent related to this record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • New • Rejected • Seen • Signed <p>The default value is 'New'.</p>

InformationVerification

Represents the details of the information verification initiated for an object. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
AssignedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the information was assigned to the verifier for verification.</p>
Comments	<p>Type textArea</p> <p>Properties Create, Nillable, Update</p> <p>Description The verifier's comments to the information verified.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the information verification was complete.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The owner of this record. This field is a polymorphic relationship field.</p>
	<p>Relationship Name Owner</p>
	<p>Refers To Group, User</p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the stage of the information verification. Possible values are:</p> <ul style="list-style-type: none"> • Approved • In progress • New • Rejected
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the information verification was started.</p>
VerificationObjectID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object for which the information verification was initiated. This field is a polymorphic relationship field.</p> <p>Relationship Name VerificationObject</p> <p>Refers To ApplicationForm, PartyProfile</p>

Field	Details
VerificationParentObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The context for which the information verification was initiated. This field is a polymorphic relationship field.</p> <p>Relationship Name VerificationParentObject</p> <p>Refers To ApplicationForm, PartyProfile</p>
VerificationScope	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the scope of the information verification.</p>
VerifiedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user or account who verified the information. This field is a polymorphic relationship field.</p> <p>Relationship Name VerifiedBy</p> <p>Refers To Account, User</p>

Associated Objects

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

[InformationVerificationChangeEvent on page 956](#)

Change events are available for the object.

[InformationVerificationFeed on page 960](#)

Feed tracking is available for the object.

InformationVerificationHistory on page 968

History is available for tracked fields of the object.

InformationVerificationOwnerSharingRule on page 973

Sharing rules are available for the object.

InformationVerificationShare on page 976

Sharing is available for the object.

InsBnftEligDefinition

Represents employee eligibility information for a benefit that's offered by an employer. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The client account that's associated with the rule This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Master-detail</p> <p>Refers To Account (the master object)</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from when the eligibility rule is active.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the eligibility rule becomes inactive.</p>
EligibilityInitiationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies when the benefit coverage of the employee starts. Possible values are: <ul style="list-style-type: none"> • Date of Hire • First of the Month Following 30 Days • First of the Month Following 60 Days • First of the Month Following Date of Hire • Hire Month + 1 Month • Hire Month start • Year Start </p>
EligibilityTerminationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies when the benefit coverage of the employee ends.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Date of Termination • End of Month following Date of Termination • Termination Month + 1 month end • Termination Month End • Year End
EmployeeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of employee the rule applies to.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Contract Based • Full Time • Full-Time 30 Hours per Week • Full-Time 32 Hours per Week • Part Time
IsChildEligible	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the employee's children are eligible for the coverage or not.</p> <p>The default value is <code>false</code>.</p>
IsPartnerEligible	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the employee's spouse or domestic partner is eligible for the coverage or not.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the rule.</p>

Associated Objects

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

[InsBnftEligDefinitionChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsBnftEligDefinitionHistory on page 968](#)

History is available for tracked fields of the object.

InsContributionPInGroupCls

Represents a junction between employee group class and their contribution towards their insurance. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The group class of an employee to which the insurance contribution plan is applicable.</p> <p>This field is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Refers To GroupClass</p>
InsuranceContributionPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The insurance contribution plan that's assigned to group class of an employee.</p> <p>This field is a relationship field.</p> <p>Relationship Name InsuranceContributionPlan</p> <p>Refers To InsuranceContributionPlan</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy benefit eligibility record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Associated Objects

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

[InsContributionPlnGroupClsChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

InsContributionPInGroupClsHistory on page 968

History is available for tracked fields of the object.

InsContributionPInGroupClsOwnerSharingRule on page 973

Sharing rules are available for the object.

InsContributionPInGroupClsShare on page 976

Sharing is available for the object.

InsContributionPInLineItem

Represents information about each contribution made by an employee towards their insurance. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount paid by the employee as contribution towards the policy.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>

Field	Details
InsuranceContributionPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent insurance contribution plan that's associated with the line item. This field is a relationship field.</p> <p>Relationship Name InsuranceContributionPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To InsuranceContributionPlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the line item.</p>
PremiumPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The percentage of premium that the contribution amount represents</p>
Tier	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the employee tier that's associated with specific contribution plan.</p>

Associated Objects

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

[InsContributionPInLineItemChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsContributionPInLineItemHistory on page 968](#)

History is available for tracked fields of the object.

InsPolicyAssetAttribute

Represents attributes for insurance policy asset. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition associated with the Insurance Policy Asset Attribute. This field is a relationship field.</p>

Field	Details
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The attribute picklist value associated with the Insurance Policy Asset Attribute. This field is a relationship field.</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
InsurancePolicyAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy asset associated with the Insurance Policy Asset Attribute. This field is a relationship field.</p>

InsPolicyAssetRelatedObj

Represents the relationship between an Insurance Policy Asset and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Asset. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy asset associated with the related object. This field is a relationship field.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy asset related object record.</p>
RelatedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the record that's used to get the details of the related insurance policy coverage object.</p>
RelatedRecordObjectName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The name of the object that's associated with the related record identifier.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage of the related record object. Possible values are:<ul style="list-style-type: none">• <code>ExtendedAttribute</code>—Extended AttributeThe default value is <code>ExtendedAttribute</code>.</p>

Associated Objects

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

[InsPolicyAssetRelatedObjFeed](#) on page 960

Feed tracking is available for the object.

[InsPolicyAssetRelatedObjHistory](#) on page 968

History is available for tracked fields of the object.

[InsPolicyBenefitEligibility](#)

Represents information about insurance eligibility of an employee that belongs to a specific group class. This object is available in API version 61 and later.

Supported Calls

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

Fields

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

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group class of employees that's associated with the eligibility rule This field is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Refers To GroupClass</p>
InsBnftEligDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The eligibility rule that is applicable under specific insurance policy or policy coverage for specific group class of employees. This field is a relationship field.</p> <p>Relationship Name InsBnftEligDefinition</p> <p>Refers To InsBnftEligDefinition</p>
InsPolicyBenefitEligibility	The insurance policy benefit that's associated with the eligibility rule.
InsurancePolicyCoverageld	The insurance policy coverage that's associated with the eligibility rule.
InsurancePolicyId	The insurance policy that's associated with the eligibility rule.

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy benefit eligibility record.</p>

Associated Objects

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

[InsPolicyBenefitEligibilityChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsPolicyBenefitEligibilityHistory on page 968](#)

History is available for tracked fields of the object.

[InsPolicyBenefitEligibilityOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsPolicyBenefitEligibilityShare on page 976](#)

Sharing is available for the object.

InsPolicyCoverageAttribute

Represents attributes for insurance policy coverage. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition associated with the Insurance Policy Coverage Attribute. This field is a relationship field.</p>
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The attribute picklist value associated with the Insurance Policy Coverage Attribute. This field is a relationship field.</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The insurance policy coverage associated with the Insurance Policy Coverage Attribute. This field is a relationship field.</p>

InsPolicyCoverageBenefit

Represents information about the insurance policy coverage benefits. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
BenefitTermGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The grouping of similar benefits that are part of the insurance policy coverage. This field is a relationship field.</p> <p>Relationship Name BenefitTermGroup</p> <p>Refers To ProductComponentGroup</p>
BenefitTermId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The terms for providing the benefit that's part of the insurance policy coverage. This field is a relationship field.</p> <p>Relationship Name BenefitTerm</p> <p>Refers To Product2</p>

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
InsPolicyCoverageNetworkId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The policy coverage network associated with the benefit.</p> <p>This field is a relationship field.</p> <p>Relationship Name InsPolicyCoverageNetwork</p> <p>Refers To InsPolicyCoverageNetwork</p>
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The insurance policy coverage that's associated with the benefit.</p> <p>This field is a relationship field.</p> <p>Relationship Name InsurancePolicyCoverage</p> <p>Relationship Type Master-detail</p> <p>Refers To InsurancePolicyCoverage (the master object)</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the insurance policy coverage benefit.</p>

Associated Objects

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

[InsPolicyCoverageBenefitChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsPolicyCoverageBenefitHistory on page 968](#)

History is available for tracked fields of the object.

InsPolicyCoverageNetwork

Represents information about the insurance policy coverage network. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar <p>The default value is USD.</p>
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The insurance policy coverage associated with the policy coverage network.</p> <p>This field is a relationship field.</p> <p>Relationship Name InsurancePolicyCoverage</p> <p>Relationship Type Master-detail</p> <p>Refers To InsurancePolicyCoverage (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the policy coverage network.</p>
TierType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of network tier. Possible values are: <ul style="list-style-type: none"> First Network Tier Fourth Network Tier Second Network Tier Third Network Tier </p>

Associated Objects

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

[InsPolicyCoverageNetworkChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsPolicyCoverageNetworkHistory on page 968](#)

History is available for tracked fields of the object.

InsPolicyCvrBnftAttribute

Represents a view of the attributes on an insurance policy coverage benefit. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition associated with the insurance policy coverage benefit attribute. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Refers To AttributeDefinition</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The attribute picklist value associated with the insurance policy coverage benefit attribute. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Refers To AttributePicklistValue</p>
InsPolicyCoverageBenefitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent insurance policy coverage benefit associated with the insurance policy coverage benefit attribute. This field is a relationship field.</p> <p>Relationship Name InsPolicyCoverageBenefit</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To InsPolicyCoverageBenefit (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the insurance policy coverage benefit attribute.</p>
Value	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy coverage benefit attribute value.</p>

InsPolicyCvrRelatedObj

Represents the relationship between an Insurance Policy Coverage and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Coverage. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy coverage associated with the related object.</p>

Field	Details
	<p>This field is a relationship field.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy coverage related object record.</p>
RelatedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the record that's used to get the details of the related insurance policy coverage object.</p>
RelatedRecordObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The name of the object that's associated with the related record identifier.</p>
UsageType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>
	<p>Description Specifies the usage of the related record object. Possible values are:<ul style="list-style-type: none"> • <code>ExtendedAttribute</code>—Extended Attribute The default value is <code>ExtendedAttribute</code>.</p>

Associated Objects

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

[InsPolicyCvrRelatedObjFeed](#) on page 960

Feed tracking is available for the object.

[InsPolicyCvrRelatedObjHistory](#) on page 968

History is available for tracked fields of the object.

InsPolicyParticipantAttr

Represents attributes for insurance policy participant. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
<code>AttributeDefinitionId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition associated with the Insurance Policy Participant Attribute. This field is a relationship field.</p>
<code>AttributeName</code>	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The attribute picklist value associated with the Insurance Policy Participant Attribute. This field is a relationship field.</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
InsurancePolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy participant associated with the Insurance Policy Participant Attribute. This field is a relationship field.</p>

InsPolicyPtcpRelatedObj

Represents the relationship between an Insurance Policy Participant and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Participant. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy participant associated with the related object. This field is a relationship field.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy participant related object record.</p>
RelatedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the record that's used to get the details of the related insurance policy participant object.</p>
RelatedRecordObjectName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The name of the object that's associated with the related record identifier.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage of the related record object. Possible values are:<ul style="list-style-type: none">• <code>ExtendedAttribute</code>—Extended AttributeThe default value is <code>ExtendedAttribute</code>.</p>

Associated Objects

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

[InsPolicyPtcpRelatedObjFeed](#) on page 960

Feed tracking is available for the object.

[InsPolicyPtcpRelatedObjHistory](#) on page 968

History is available for tracked fields of the object.

InsPolicyRelatedObject

Represents the relationship between an Insurance Policy and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy that's associated with the related object. This field is a relationship field.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the insurance policy related object record.</p>
RelatedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the record that's used to get the details of the related insurance policy object.</p>
RelatedRecordObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The name of the object that's associated with the related record identifier.</p>

Field	Details
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage of the related record object.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>ExtendedAttribute</code>—Extended Attribute <p>The default value is <code>ExtendedAttribute</code>.</p>

Associated Objects

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

[InsPolicyRelatedObjectFeed](#) on page 960

Feed tracking is available for the object.

[InsPolicyRelatedObjectHistory](#) on page 968

History is available for tracked fields of the object.

InsPolicyTransactionDetail

Represents the details of an insurance policy transaction. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy transaction associated with the insurance policy transaction detail.</p> <p>This is a relationship field.</p>

Field	Details
	<p>Relationship Name InsurancePolicyTransaction</p> <p>Relationship Type Lookup</p> <p>Refers To InsurancePolicyTransaction</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the insurance policy transaction detail record.</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The coverage, insured item, or participant record associated with the insurance policy transaction detail. This is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To InsurancePolicyAsset, InsurancePolicyCoverage, InsurancePolicyParticipant

Associated Objects

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

[InsPolicyTransactionDetailChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsPolicyTransactionDetailFeed on page 960](#)

Feed tracking is available for the object.

[InsPolicyTransactionDetailHistory on page 968](#)

History is available for tracked fields of the object.

[InsPolicyTransactionDetailOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsPolicyTransactionDetailShare on page 976](#)

Sharing is available for the object.

InsuranceClaimAsset

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

Supported Calls

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

Fields

Field	Details
ClaimId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the originating claim.
InsurancePolicyAssetId	Type reference

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

Associated Objects

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

[InsuranceClaimAssetFeed](#)

Feed tracking is available for the object.

[InsuranceClaimAssetHistory](#)

History is available for tracked fields of the object.

InsuranceContract

Represents insurance-specific contract information. Extension of Contract object, specifically for the insurance industry. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
BrokerageAgencyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The brokerage agency associated with the insurance contract. This is a relationship field.</p> <p>Relationship Name BrokerageAgency</p> <p>Relationship Type Lookup</p> <p>Refers To Producer</p>
BusinessLicenseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Agency license associated with the insurance contract. This is a relationship field.</p>

Field	Details
	<p>Relationship Name BusinessLicense</p> <p>Relationship Type Lookup</p> <p>Refers To BusinessLicense</p>
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The contract associated with the insurance contract. This is a relationship field.</p> <p>Relationship Name Contract</p> <p>Relationship Type Lookup</p> <p>Refers To Contract</p>
EnrollmentCensusId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The enrollment group census associated with the insurance contract used during enrollment. This is a relationship field.</p> <p>Relationship Name EnrollmentCensus</p> <p>Relationship Type Lookup</p> <p>Refers To GroupCensus</p>
EnrollmentEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when enrollment ends for the plans in the insurance contract.</p>

Field	Details
EnrollmentStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when enrollment starts for the plans in the insurance contract.</p>
EnrollmentWaitingPeriod	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The waiting period in days after joining date before enrollment can begin.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the insurance contract.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The owner associated with the insurance contract. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The producer or broker associated with the insurance contract. This is a relationship field.</p> <p>Relationship Name Producer</p> <p>Relationship Type Lookup</p> <p>Refers To Producer</p>
UnderwriterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The underwriter associated with the insurance contract. This is a relationship field.</p> <p>Relationship Name Underwriter</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>

Associated Objects

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

[InsuranceContractChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceContractFeed on page 960](#)

Feed tracking is available for the object.

[InsuranceContractHistory on page 968](#)

History is available for tracked fields of the object.

[InsuranceContractOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsuranceContractShare on page 976](#)

Sharing is available for the object.

InsuranceContributionPlan

Represents all contributions made by an employee towards their insurance policy or insurance policy coverage. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
AdditionalInformation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The additional information about the contribution plan.</p>
ContributionFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the contribution frequency. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Annually • Monthly • Quarterly
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
InsurancePolicyCoverageId	The insurance policy coverage that's associated with the insurance contribution plan.
InsurancePolicyId	The insurance policy that's associated with the insurance contribution plan.
IsNonContributory	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the employee contributes to the plan or not.</p> <p>The default value is <code>false</code>.</p>
IsPreTax	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the contribution is pre tax or not.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the plan.</p>

Associated Objects

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

[InsuranceContributionPlanChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceContributionPlanFeed on page 960](#)

Feed tracking is available for the object.

[InsuranceContributionPlanHistory on page 968](#)

History is available for tracked fields of the object.

[InsuranceContributionPlanOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsuranceContributionPlanShare on page 976](#)

Sharing is available for the object.

[InsurancePolicy](#)

Represents the type of insurance policy, such as auto, home, life, or annuity.

Supported Calls

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

Fields

Field	Details
ActualRenewalDate	The actual renewal date of the policy.
AuditTerm	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of the audit. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.</p>
BillingCarrierAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the Billing Carrier Account associated with the Insurance Policy. When the company that sells the policy also writes the policy, then the billing carrier is the same as the writing carrier.</p> <p>This field is a relationship field.</p> <p>Relationship Name BillingCarrierAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
BillingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of billing for the policy.</p> <p>Possible values are:</p>

Field	Details
CancellationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the insurance policy was canceled.</p>
CancellationReason	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The reason for canceling the insurance policy.</p>
CancellationReasonType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category that the cancellation reason belongs to.</p>
CashSurrenderValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The cash surrender value of the insurance policy.</p>
ChangeSubtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A further categorization of the change type. For example, childbirth, marriage.</p>
ChangeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the change in the policy. For example: life event, house renovation.</p>

Field	Details
CommissionFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of receiving commission from the carrier.</p>
CommissionPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of policy premium to be earned as commission by the brokerage firm.</p>
CurrentDueAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The current due amount for the policy.</p>
DateRenewed	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the policy was last renewed.</p>
Discount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount that was given on the policy.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the policy is in effect.</p>

Field	Details
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the policy becomes effective.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until when the policy remains effective.</p>
ExpectedRevenueAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The revenue amount that the brokerage firm is expected to earn from the policy.</p>
EmployeeContribution	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The employee's contribution towards the insurance premium value.</p>
EmployerContribution	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The employer's contribution towards the insurance premium value.</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the policy expires.</p>

Field	Details
FinalRenewalDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The final date on which the policyholder can renew the insurance policy.</p>
FundingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies how the policy is being funded. Possible values are: <ul style="list-style-type: none"> • Fully Insured • Level Funded • Self Funded </p>
GrossWrittenPremium	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total expected premium amount for the insurance policy over the policy period.</p>
HasAnyAutoCoverage	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the insurance policy has an Any Auto coverage, which extends the coverage to hired and other non-owned vehicles. The default value is False.</p>
IntermediaryAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Intermediary Account associated with the Insurance Policy. This field is a relationship field.</p>

Field	Details
Relationship Name	IntermediaryAccount
Relationship Type	Lookup
Refers To	Account
IsActive	Type boolean
Properties	Defaulted on create, Filter, Group, Sort
Description	Indicates whether the policy is active. The default value is False.
	Creating or updating an InsurancePolicy sets <code>IsActive</code> automatically based on the <code>Status</code> field value. For example, you can set <code>IsActive</code> to False by setting <code>Status</code> to Inactive.
IsLoanEligibile	Type boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether a loan can be requested against the insurance policy. The default value is False.
IsPolicyEditLocked	Type boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the application locks the policy record. The default value is False.
IsRenewedPolicy	Type boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the policy is a renewed policy. The default value is False.
LastReferencedDate	Type dateTime

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The line of business associated with the policy.</p>
LineOfCoverage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The coverage type of the policy.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The insurance policy number.</p>
NameInsuredId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the primary insured.</p>

Field	Details
OriginalEffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the original policy went into effect. This field is available from API version 51.0 and later.</p>
OriginalEffectiveFromDate	The date when the original policy became effective.
OriginalEffectiveToDate	The date until when the original policy remains effective.
OriginalExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Expiration date of the original policy. This field is available from API version 51.0 and later.</p>
OriginalPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the original insurance policy. This field is available from API version 51.0 and later.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>
PaidToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date up to which the policy is paid for. This field is available from API version 51.0 and later.</p>
ParentPolicyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent policy that covers this policy. For example, a parent policy can cover an auto policy and home policy.</p>
PastDueAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount past due for the policy.</p>
PaymentDueDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The due date for the next payment of the premium.</p>
PlannedRenewalDate	The expected renewal date of the policy.
PlanTier	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class that the insurance policy belongs to. For example, silver, gold, or platinum.</p>
PlanType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the insurance policy plan. For example, single life, joint last-to-die, or joint first-to-die (primarily applicable for term insurance).</p>
PolicyCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The code that's unique for the policy across all versions.</p>
PolicyDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the insurance policy.</p>
PolicyName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the insurance policy.</p>
PolicyTerm	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The time period for which the policy provides coverage. This field is available from API version 51.0 and later.</p> <p> Note: Salesforce services support only annual policy terms. However, you can use the other policy term values in custom implementations. For more information, see Considerations and Limitations for Insurance Policies.</p>
PolicyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the insurance policy. For example, home, auto, annuity, or life.</p>
PremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium paid by the policy owner for the current billing period.</p>

Field	Details
PremiumCalculationMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The premium calculation method for a payment period. This field is available from API version 51.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Daily • Modal
PremiumFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of the premium payment or billing. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.</p>
PremiumPaymentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of premium payment, such as Advance or Arrears. This field is available from API version 51.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Advance • Arrears
PreviousPremium	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium of the policy before it was renewed.</p>
PreviousRenewalDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The most recent renewal date for the insurance policy.</p>
PriorPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the insurance policy before it was renewed.</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the agency or the agent who sold the policy.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product that this policy belongs to. For example, if the customer buys a silver auto policy, this field looks up to the silver auto product in the Product object.</p>
RatingDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date to determine the rating details on a mid-term adjustment, endorsement, or out-of-sequence endorsement to a policy.</p>
ReferencePolicyNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference number of the insurance policy that is renewed when the policy term tracking is continued across multiple policy versions. For example, if a limit is a "Lifetime Limit", then the policy term tracking is tracked across all versions of the policy.</p>

Field	Details
RenewalChannel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The channel used to renew the insurance policy. Possible values are:</p> <ul style="list-style-type: none"> • Chatbot • Mobile • Phone • Web
RenewalDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The next expected policy renewal date. The actual renewal date may be different.</p>
SaleDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the policy was sold.</p>
ServicingOffice	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address of the office that issued the policy and that services the policy. This is a compound field of type Address and combines these fields: ServicingOfficeCity, ServicingOfficeCountry, ServicingOfficeGeocodeAccuracy, ServicingOfficeLatitude, ServicingOfficeLongitude, ServicingOfficePostalCode, ServicingOfficeState, and ServicingOfficeStreet. For more information, see Address Compound Fields.</p>
SourceOpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The ID of the opportunity from which the policy was created.
SourceSystem	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the source system this record was obtained from.
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The ID of this record in the source system.
StandardFeeAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
StandardPremiumAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
StandardTaxAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the insurance policy.</p>
Substatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The carrier system's substatus code for the insurance policy.</p>
TaxesSurcharges	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The taxes and surcharges levied on the premium for the insurance policy.</p>
TermFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TotalStandardAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.</p>
TotalSumInsured	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total insured amount. This field is available from API version 51.0 and later.</p>
TotalTermFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The current total term fees of all policy versions.</p>
TotalTermPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The current total term premium of all policy versions.</p>
TotalTermTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The current total term taxes of all policy versions.</p>

Field	Details
UnderwritingEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Legal entity that underwrote the insurance policy.</p>
UniversalPolicyNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A number that uniquely identifies the policy across different source systems.</p>
WritingCarrierAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Writing Carrier Account associated with the Insurance Policy. This field is a relationship field.</p> <p>Relationship Name WritingCarrierAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>

Associated Objects

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

[InsurancePolicyChangeEvent \(API version 61.0\)](#)

Change events are available for the object.

[InsurancePolicyFeed](#)

Feed tracking is available for the object.

[InsurancePolicyHistory](#)

History is available for tracked fields of the object.

[InsurancePolicyOwnerSharingRule](#)

Sharing rules are available for the object.

InsurancePolicyShare

Sharing is available for the object.

InsurancePolicyAsset

Represents the customer property insured through the insurance policy.

Supported Calls

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

Fields

Field	Details
AssetCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique code of the insurance policy asset across all the policy versions.
AssetName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The insured customer property. This field is available from API version 51.0 and later.
CustomerPropertyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the insured customer property.
EffectiveFromDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from when the asset becomes active on the policy.

Field	Details
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date after when the asset becomes inactive on the policy.</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the insurance policy that covers this customer property.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the insurance policy asset is active. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p>

Field	Details
	<p>Description An auto-generated number assigned to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>
PrimaryPolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the primary participant on the insurance policy. This field is available from API version 51.0 and later.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the asset. This field is a relationship field.</p>
RelatedInsurancePolicyAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The related insurance policy asset id associated with the insurance policy asset. This field is available from API version 54.0 and later. This field is a relationship field.</p> <p>Relationship Name RelatedInsurancePolicyAsset</p> <p>Relationship Type Lookup</p> <p>Refers To InsurancePolicyAsset</p>

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>
StandardFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.</p>
TermFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermPremiumAmount	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermTaxAmount	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TotalStandardAmount	Type
	<p>currency</p>
	Properties
	<p>Filter, Nillable, Sort</p>
	Description
	<p>The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later.</p>
	<p>This is a calculated field.</p>
TotalTermAmount	Type
	<p>currency</p>
	Properties
	<p>Filter, Nillable, Sort</p>
	Description
	<p>The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
	<p>This is a calculated field.</p>

Associated Objects

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

InsurancePolicyAssetChangeEvent on page 956

Change events are available for the object in API version 62.0 and later.

InsurancePolicyAssetFeed

Feed tracking is available for the object.

InsurancePolicyAssetHistory

History is available for tracked fields of the object.

InsurancePolicyAssetOwnerSharingRule

Sharing rules are available for the object.

InsurancePolicyAssetShare

Sharing is available for the object.

InsurancePolicyAttribute

Represents attributes for insurance policy. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition associated with the Insurance Policy Attribute. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Refers To AttributeDefinition</p>
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>

Field	Details
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The attribute picklist value associated with the Insurance Policy Attribute. This field is a relationship field.</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The insurance policy associated with the Insurance Policy Attribute. This field is a relationship field.</p>

InsurancePolicyCoverage

A junction object that associates the InsurancePolicy object with the ProductCoverage object.

Supported Calls

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

Fields

Field	Details
BenefitPaymentFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The frequency of the payment if the benefit or coverage entails a recurring payout to the insured. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.</p>
Category	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The category that the coverage belongs to. For example, benefit, clause, deductible, rider.</p>
CategoryCode	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.</p>
CategoryGroup	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.</p>
CategoryGroupType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The type of the category group.</p>
ContractGroupPlanId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The contract group plan associated with the insurance policy coverage.</p>
CoverageCode	Type
	string

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The unique code of the insurance policy coverage across all the policy versions.</p>
CoverageName	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The name of the coverage.</p>
DeathBenefitOptionType	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The method for the payment of death benefit.</p>
DeductibleAmount	<p>Type currency</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description The deductible amount that the customer must pay.</p>
Description	<p>Type textarea</p>
	<p>Properties Create, Nillable, Update</p>
	<p>Description The description of the coverage.</p>
Discount	<p>Type currency</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description The discount that was given on the coverage or the benefit.</p>
EffectiveDate	<p>Type dateTime</p>

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description The date from which the coverage is in effect.
ExpirationDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date on which the coverage expires.
IncomeOptionType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.
InsurancePolicyAssetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The asset covered by this coverage.
InsurancePolicyId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The insurance policy associated with this coverage.
InsurancePolicyParticipantId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The insurance policy participant associated with this coverage.

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LimitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.</p>
LimitDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.</p>
LimitPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the actuals covered by this coverage.</p>
LimitRange	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
PremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium paid by the customer for this coverage.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this coverage record in the source system.</p>
StandardFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardPremiumAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.</p>
TermFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TotalStandardAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later.</p> <p>This is a calculated field.</p>

Associated Objects

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

[InsurancePolicyCoverageChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsurancePolicyCoverageFeed](#)

Feed tracking is available for the object.

[InsurancePolicyCoverageHistory](#)

History is available for tracked fields of the object.

[InsurancePolicyCoverageOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsurancePolicyCoverageShare on page 976](#)

Sharing is available for the object.

InsurancePolicyMemberAsset

A junction object that associates the InsurancePolicyAsset object with the InsurancePolicyParticipant object. You see this object only if you've enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
InsurancePolicyAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the insured asset.</p>

Field	Details
InsurancePolicyId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the insurance policy associated with the asset. This field is available from API version 51.0 and later.</p>
InsurancePolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the insured policy participant.</p>
IsAssetIsParent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the asset is the parent of the insurance (true) or the participant (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>

Associated Objects

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

[InsurancePolicyMemberAssetChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsurancePolicyMemberAssetFeed](#)

Feed tracking is available for the object.

[InsurancePolicyMemberAssetHistory](#)

History is available for tracked fields of the object.

[InsurancePolicyMemberAssetOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsurancePolicyMemberAssetShare on page 976](#)

Sharing is available for the object.

InsurancePolicyParticipant

A junction object that associates the InsurancePolicy object with the Account object. This object represents the participants of an insurance policy. Insurance policy participants include policy owners and beneficiaries.

Supported Calls

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

Fields

Field	Details
BeneficiarySharePercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the total benefits that goes to the nominee.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from which the participant is active on the policy.</p>
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from when the participant becomes active on the policy.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date after when the participant becomes inactive on the policy.</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from which the participant is inactive on the policy.</p>

Field	Details
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the insurance policy.</p>
IsActiveParticipant	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the participant is an active participant on the policy. The default value is False.</p>
IsMinorBeneficiary	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the nominee is a minor. The default value is False.</p>
IsPolicyholder	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether this client owns the policy or is just a participant on the policy. This field is available from API version 51.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LegalGuardianId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal guardian of the minor beneficiary. This can be a business account or a person account.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
ParticipantCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique code of the insurance policy participant across all the policy versions.</p>
ParticipantName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the participant of the insurance policy.</p>
PrimaryParticipantAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the primary participant's account.</p>
PrimaryParticipantContactId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the primary participant's contact.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the participant. This field is a relationship field.</p>
RelatedInsPolicyParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The related insurance policy participant. This field is a relationship field.</p>
RelatedParticipantAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the related participant's account.</p>
RelatedParticipantContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the related participant's contact.</p>
RelationshipToInsured	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The relationship of the nominee with the insured.</p>

Field	Details
Role	<p>Type multipicklist</p> <p>Properties Create, Filter, Update</p> <p>Description The roles that the participant has in the policy. For example, owner, beneficiary, driver.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>
StandardFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.</p>
StandardTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.</p>
TermFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TermTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p>
TotalStandardAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.</p>
TotalTermAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.</p> <p>This is a calculated field.</p>

Associated Objects

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

[InsurancePolicyParticipantChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsurancePolicyParticipantFeed](#)

Feed tracking is available for the object.

[InsurancePolicyParticipantHistory](#)

History is available for tracked fields of the object.

[InsurancePolicyParticipantOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsurancePolicyParticipantShare on page 976](#)

Sharing is available for the object.

InsurancePolicySurcharge

Represents the charges calculated for an insurance policy and its related assets, coverages, and participants in a region. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicableObjectType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies the item on which the surcharge was applied.</p> <p>Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • <code>InsurancePolicyAsset</code>—Insurance Policy Asset • <code>InsurancePolicyCoverage</code>—Insurance Policy Coverage • <code>InsurancePolicyParticipant</code>—Insurance Policy Participant
<code>InsurancePolicyAssetId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy asset associated with the surcharge.</p>
<code>InsurancePolicyCoverageId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy coverage associated with the surcharge.</p>
<code>InsurancePolicyId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The insurance policy associated with the surcharge.</p>
<code>InsurancePolicyParticipantId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy participant associated with the surcharge.</p>
<code>InsurancePolicyTransactionId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy transaction associated with the surcharge.</p>
<code>IsProrationAllowed</code>	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the term surcharge amount is prorated based on the policy duration. The default value is <code>false</code>.</p>
IsRefundAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the term surcharge amount is eligible for refund. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the insurance policy surcharge.</p>
ProductSurchargeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The product surcharge associated with an insurance policy surcharge. This field is a relationship field.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which this insurance policy surcharge was obtained.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the insurance policy surcharge record in the source system. This field is unique within your organization.</p>
SurchargeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The surcharge amount calculated for an insurance policy, insurance policy asset, insurance policy coverage, or an insurance policy participant. This surcharge is calculated based on the tax and fee structure defined for products or can be retrieved from a source system.</p>
TermSurchargeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The surcharge amount calculated for the duration of an insurance policy, insurance policy asset, insurance policy coverage, or insurance policy participant.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of surcharge.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> Fee Tax

Associated Objects

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

[InsurancePolicySurchargeChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsurancePolicySurchargeHistory on page 968](#)

History is available for tracked fields of the object.

[InsurancePolicySurchargeOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsurancePolicySurchargeShare on page 976](#)

Sharing is available for the object.

InsurancePolicyTransaction

Represents a transaction related to a change that affects the premium of an insurance policy, such as an endorsement, renewal, or cancellation. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the transaction category for the insurance policy.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Cancellation Endorsement

Field	Details
	<ul style="list-style-type: none"> • Issuance • Reinstatement • Renewal
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from when the transaction becomes effective.</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The insurance policy this transaction is related to.</p>
InsurancePolicyVersionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current version of the insurance policy.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the transaction.</p>
ParentTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction this insurance policy transaction is related to. For example, a charge transaction is the parent transaction for a payment made against that charge.</p>
PostedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the customer was charged for the insurance policy.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current status of a policy transaction. Possible values are:</p> <ul style="list-style-type: none"> Approved Pending Reversed
TotalTransactionAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of transaction, including transaction fee and tax. This is a calculated field.</p>
TransactionAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The transaction amount.</p>
TransactionEffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date of the transaction.</p>
TransactionFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The prorated fee for the transaction.</p>
TransactionNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An identifier for the transaction from an external system.</p>
TransactionPostedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the amount was charged to the customer.</p>
TransactionTaxAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The prorated tax on the transaction amount.</p>
Type	<p>Type picklist</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	<p>Specifies the type of transaction.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Cancellation • Credit • Deposit • Endorsement • Loan • Premium Payment • Renewal • Surcharge • Surrender • Withdrawal

Associated Objects

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

[InsurancePolicyTransactionChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsurancePolicyTransactionFeed on page 960](#)

Feed tracking is available for the object.

[InsurancePolicyTransactionHistory on page 968](#)

History is available for tracked fields of the object.

[InsurancePolicyTransactionOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsurancePolicyTransactionShare on page 976](#)

Sharing is available for the object.

InsuranceProfile

Represents the insurance-related attributes for the insured member.

Supported Calls

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

Fields

Field	Details
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the contact related to this insurance profile.</p>
IsAlcoholAbuser	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person has a history of alcohol abuse. The default value is False.</p>
IsAlcoholConsumer	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person consumes alcohol. The default value is False.</p>
IsDrugAbuser	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person has a history of drug abuse. The default value is False.</p>
IsGoodDriver	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person is categorized as a good driver. The default value is False.</p>
IsGoodStudent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	Indicates whether the person is categorized as a good student. The default value is False.
IsHighRiskOccupation	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the person's current employment is a high-risk job. The default value is False.
IsLicenseSuspended	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the insured member's driver's license was ever suspended. The default value is False.
IsTobaccoConsumer	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the person consumes tobacco. The default value is False.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
MajorCitationCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of major citations the person had when the policy was created.</p>
MinorCitationCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of minor citations the person had when the policy was created.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
NumberOfAccidents	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of accidents the insured member was involved in.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in the source system.</p>

Associated Objects

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

[InsuranceProfileChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceProfileFeed](#)

Feed tracking is available for the object.

[InsuranceProfileHistory](#)

History is available for tracked fields of the object.

[InsuranceProfileOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsuranceProfileShare on page 976](#)

Sharing is available for the object.

InsuranceRatePlan

Represents a rate plan for an employee's insurance. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• EUR—Euro• GBP—British Pound• USD—U.S. Dollar <p>The default value is USD.</p>
ExpectedRevenueAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The revenue amount that the brokerage is expected to earn from the rate plan.</p>
Frequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the frequency of premium, fees, or premium equivalents for the insurance under specified rate plan.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Annually • Monthly • Quarterly
GeoStateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the rate plan is applicable.</p> <p>This field is a relationship field.</p> <p>Relationship Name GeoState</p> <p>Refers To GeoState</p>
InsurancePolicyCoverageId	The insurance policy coverage associated with the rate plan.
InsurancePolicyId	The insurance policy associated with the rate plan.
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the rate plan.</p>
TotalFeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total fee amount for the rate plan.</p>
TotalPremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total premium amount of the insurance for the specified rate plan.</p>
TotalPremiumEqvAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total premium equivalent amount that's used for a fully insured equivalent rate plan.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Specifies the type of insurance rate plan that determines the calculation method for premium, fee, or premium equivalent</p>

Associated Objects

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

[InsuranceRatePlanChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceRatePlanHistory on page 968](#)

History is available for tracked fields of the object.

[InsuranceRatePlanOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InsuranceRatePlanShare on page 976](#)

Sharing is available for the object.

InsuranceRatePlanCommission

Represents the commission details for the insurance rate plan. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
AmountEndRange	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end range of amount for graded percent of premium.</p>
AmountStartRange	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The start range of amount for graded percent of premium.</p>
CurrencyIsoCode	Type
	<p>picklist</p>
	Properties
	<p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	Description
	<p>If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar
	<p>The default value is USD.</p>
Fee	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The commission fee when Flat Fee or Capitated Fees are selected.</p>
FeePercent	Type
	<p>percent</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The percentage of fee to be earned as commission when flat percentage of fee is selected.</p>
InsuranceRatePlanId	Type
	<p>reference</p>
	Properties
	<p>Create, Filter, Group, Sort, Update</p>
	Description
	<p>The insurance rate plan associated with the commission.</p>
	<p>This field is a relationship field.</p>
	Relationship Name
	<p>InsuranceRatePlan</p>
	Relationship Type
	<p>Master-detail</p>

Field	Details
	<p>Refers To InsuranceRatePlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the commission rate plan.</p>
NumberEndRange	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end range of the grade volume, which represents the employee count.</p>
NumberStartRange	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start range of the grade volume, which represents the employee count.</p>
PremiumPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The percentage of premium to be earned as commission when graded percent of premium or flat percent of premium is selected.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of commission structure. Possible values are:</p> <ul style="list-style-type: none"> • Capitated Fee • Flat Fee • Flat Fee Percentage • Flat Premium Percentage • Graded Premium Percentage • Graded Volume

Associated Objects

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

[InsuranceRatePlanCommissionChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceRatePlanCommissionHistory on page 968](#)

History is available for tracked fields of the object.

InsuranceRatePlanLineItem

Represents insurance rates information that's provided by carriers specific to employees of certain tiers under certain policy or policy coverage. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar <p>The default value is USD.</p>
EnrollmentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of employees that are insured at a specific tier.</p>
FeeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The fee amount for the insurance plan for a specific tier.</p>
InsuranceRatePlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent insurance rate plan that's associated with the line item.</p> <p>This field is a relationship field.</p> <p>Relationship Name InsuranceRatePlan</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To InsuranceRatePlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the line item.</p>
PremiumAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium amount for the insurance plan for a specific tier.</p>
PremiumEqvAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium equivalent amount for the insurance plan for a specific tier.</p>
Rate	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The rate at which the employer contributes for the insurance for each employee.</p>
RateBasisAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The basis amount that's used to calculate the insurance rate or fee value.</p>
RateQualifierAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description A per unit amount that's used to calculate premiums for benefit volume or covered payroll based plans.</p>
Tier	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employee tier that's used to determine the plan rate. Possible values are:</p> <ul style="list-style-type: none"> • Employee & Children • Employee & Family • Employee & Spouse • Employee Only

Associated Objects

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

[InsuranceRatePlanLineItemChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[InsuranceRatePlanLineItemHistory on page 968](#)

History is available for tracked fields of the object.

IntegrationProviderAttr

Represents information about the attributes that are used in the definition for an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the data type of the attribute. Possible values are:</p> <ul style="list-style-type: none">• Boolean• Date• DateTime—Date Time• Double• Integer• Percentage• String
DateTimeValue	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date time value of the attribute.</p>
DateValue	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date value of the attribute.</p>

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the attribute.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The developer name of the integration provider attribute.</p>
DoubleValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The double value of the attribute.</p>
IntegerValue	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integer value of the attribute.</p>
IntegrationProviderDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The integration provider definition that's associated with the attribute. This field is a relationship field.</p> <p>Relationship Name IntegrationProviderDef</p> <p>Relationship Type Lookup</p> <p>Refers To IntegrationProviderDef</p>

Field	Details
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the attribute is required (true) or not (false). The default value is <code>false</code>.</p>
IsTrueOrFalseValue	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The value in the boolean field of the attribute. The default value is <code>false</code>.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The master label of the attribute.</p>
PercentageValue	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage value of the attribute.</p>
StringValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The string value of the attribute.</p>

IntegrationProviderDef

Represents the definition that's applicable to an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ApexClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The apex class that's associated with the definition. This field is a relationship field.</p> <p>Relationship Name ApexClass</p> <p>Relationship Type Lookup</p> <p>Refers To ApexClass</p>
CanUseInIntegrationOrch	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the integration definition can be used in an integration orchestration (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 61.0 and later.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description about the integration provider definition.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	Description The developer name of the integration provider definition.
ExternalServiceOperationName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The external service registration that's associated with the integration provider.
FileBasedApexClass	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The API name of the file-based apex class.
InputDataProcessorId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The input data processor that's associated with the integration provider.
	This field is a relationship field.
	Relationship Name InputDataProcessor
	Relationship Type Lookup
	Refers To OmnilIntegrationProcConfig
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the integration provider is active (true) or inactive (false).
	The default value is <code>false</code> .
IsManual	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the integration definition mode is manual (<code>true</code>) or automatic (<code>false</code>). The default value is <code>false</code> . Available in API version 61.0 and later.
IsServiceTypeIntegration	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the integration definition mode is Service Type (True) or Process Type (False). The default value is <code>false</code> .
Language	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The language of the integration provider definition.
MasterLabel	Type string
	Properties Create, Filter, Group, Sort, Update
	Description A unique name of the integration provider definition.
NamespacePrefix	Type string
	Properties Filter, Group, Nillable, Sort
	Description Namespace prefix associated with this object.
OmniUiCardConfigId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The FlexCard component associated with the integration provider. Available in API version 61.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name OmniUiCardConfig</p> <p>Relationship Type Lookup</p> <p>Refers To OmniUiCardConfig</p>
OutputDataProcessorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The output data processor that's associated with the integration provider.</p> <p>This field is a relationship field.</p> <p>Relationship Name OutputDataProcessor</p> <p>Relationship Type Lookup</p> <p>Refers To OmniIntegrationProcConfig</p>
StorePayload	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the JSON payload from the request and response must be saved in logs.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>DontPersistPayload</code>—The request and response samples aren't saved in logs. • <code>PersistPayload</code>—The request and response samples are saved in logs. <p>The default value is <code>DontPersistPayload</code>. Available in API version 61.0 and later.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the type of definition that's defined for an integration provider.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Apex LowCode—Low Code

IntegrationProviderDcsnRqmt

Represents a decision requirement used to create integration provider records. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
IntegrationProviderDefId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The integration definition associated with the integration provider decision requirement.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>IntegrationProviderDef</p> <p>Refers To</p> <p>IntegrationProviderDef</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nullable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party credit profile record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RelatedObject	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The object for which integration provider decision requirement is defined. Possible values are:</p> <ul style="list-style-type: none"> • Applicant • ApplicationActionItem—Application Action Item • ApplicationForm—Application Form • ApplicationFormProduct—Application Form Product • ApplicationFormProductDev—Application Form Product Deviation • ApplicationFormSellerItem—Application Form Seller Item • Deviation • InformationVerification—Information Verification

Field	Details
	<ul style="list-style-type: none"> • <code>PartyExpense</code>—Party Expense • <code>PartyFinancialAsset</code>—Party Financial Asset • <code>PartyFinancialLiability</code>—Party Financial Liability • <code>PartyIdentityVerification</code>—Party Identity Verification • <code>PartyIdentityVerificationStep</code>—Party Identity Verification Step • <code>PartyIncome</code>—Party Income • <code>PartyProfile</code>—Party Profile • <code>PartyScreeningStep</code>—Party Screening Step • <code>PartyScreeningSummary</code>—Party Screening Summary • <code>PersonEmployment</code>—Person Employment • <code>Product2</code>—Product • <code>devopsimpkg11__DRBatchQueue__c</code>—Vlocity Omnistudio Data Mapper Batch Queue • <code>devopsimpkg11__DRBulkData__c</code>—Omnistudio Data Mapper Bulk Data • <code>devopsimpkg11__DocumentTemplateSetting__mdt</code>—Document Template Setting • <code>devopsimpkg11__Interface_DRGeneric__c</code>—Vlocity Omnistudio Data Mapper Object Interface • <code>devopsimpkg11__PDFTronEncryptionKey__mdt</code>—PDFTron Encryption Key • <code>devopsimpkg11__TestResult__c</code>—Test Result • <code>devopsimpkg11__VlocityDataPack__c</code>—Vlocity DataPack Object • <code>devopsimpkg11__VlocityDocuSignTemplate__c</code>—Vlocity DocuSign Template • <code>devopsimpkg11__VlocityErrorLogEntry__c</code>—Vlocity Error Log Entry • <code>devopsimpkg11__VlocityScheduledJob__c</code>—Vlocity Scheduled Job • <code>devopsimpkg11__VlocityTrackingEntry__c</code>—Vlocity Tracking Entry
<code>RunAsUserId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The user associated with the integration provider decision requirement. This field is a relationship field.</p> <p>Relationship Name RunAsUser</p> <p>Refers To User</p>

IntegrationProviderExecution

Represents the execution instance of an integration provider. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
ErrorCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error code returned from the integration execution.</p>
ExecutionDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time an integration is executed.</p>
ExecutionStepInstanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The instance of the integration execution. This field is a relationship field.</p> <p>Relationship Name ExecutionStepInstance</p> <p>Refers To FulfillmentStep</p>
IntegrationProviderDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The integration definition associated with the integration execution. This field is a relationship field.</p> <p>Relationship Name IntegrationProviderDef</p> <p>Refers To IntegrationProviderDef</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party credit profile record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ReferenceObjectIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The object referenced to execute an integration.</p>
RequestPayloadId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The content document that stores the request payload associated with the integration execution.</p> <p>This field is a relationship field.</p> <p>Relationship Name RequestPayload</p> <p>Refers To ContentDocument</p>
ResponsePayloadId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The content document that stores the response payload associated with the integration execution.</p> <p>This field is a relationship field.</p> <p>Relationship Name ResponsePayload</p> <p>Refers To ContentDocument</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the integration execution.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Failed

Field	Details
	<ul style="list-style-type: none"> • In Progress • Not Started—Pending • Success

Interaction

Represents an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account related to the customer or partner who attended the interaction.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the interaction.</p>
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time that the interaction ended.</p>
InteractionType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of interaction. Possible values are:</p> <ul style="list-style-type: none"> • Conference • Email • In Person • Phone Call
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastSyncedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>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.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location of the interaction.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the interaction.</p>
ReferenceIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique reference ID of the interaction.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialDeal, Opportunity</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time that the interaction started.</p>

Associated Objects

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

[InteractionChangeEvent on page 956](#)

Change events are available for the object.

[InteractionFeed on page 960](#)

Feed tracking is available for the object.

[InteractionHistory on page 968](#)

History is available for tracked fields of the object.

[InteractionOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InteractionShare on page 976](#)

Sharing is available for the object.

InteractionAttendee

Represents an attendee of an interaction. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
AttendeeResponse	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the response of the attendee to the interaction. Possible values are:</p> <ul style="list-style-type: none">AcceptedDeclinedAwaiting Response
AttendeeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The type of attendee.</p>
	<p>Possible values are:</p> <ul style="list-style-type: none"> • External • Internal
ContactId	<p>Type</p>
	<p>reference</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>The contact who attended the interaction.</p>
EmailAddress	<p>Type</p>
	<p>email</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>The email address of the attendee.</p>
EventId	<p>Type</p>
	<p>reference</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>The event on Salesforce calendar for this attendee.</p>
InteractionId	<p>Type</p>
	<p>reference</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>The interaction for which this attendee record is created.</p>
IsOrganizer	<p>Type</p>
	<p>boolean</p>
	<p>Properties</p>
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>Indicates whether the attendee is the interaction organizer.</p>
	<p>The default value is 'false'.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastSyncedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>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.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the interaction attendee.</p>
UserID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user who attended the interaction.</p>

Associated Objects

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

InteractionAttendeeChangeEvent on page 956

Change events are available for the object.

InteractionAttendeeFeed on page 960

Feed tracking is available for the object.

InteractionAttendeeHistory on page 968

History is available for tracked fields of the object.

InteractionParticipant

Represents a user or User Group with whom the interaction is shared. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Notes about this participant.</p>
InteractionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The call report that's shared with this user. This is a relationship field.</p> <p>Relationship Name Interaction</p> <p>Relationship Type Lookup</p> <p>Refers To Interaction</p>
IsActive	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this participant is active. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the call report participant.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The user or group that the call report is shared with. This is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Field	Details
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The role assigned to this participant. This is a relationship field.</p> <p>Relationship Name ParticipantRole</p> <p>Relationship Type Lookup</p> <p>Refers To ParticipantRole</p>

Associated Objects

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

[InteractionParticipantChangeEvent on page 956](#)

Change events are available for the object.

[InteractionParticipantFeed on page 960](#)

Feed tracking is available for the object.

[InteractionParticipantHistory on page 968](#)

History is available for tracked fields of the object.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account of a company that's associated with the interaction. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
AccountRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the role of the account in the interaction. Possible values are:</p> <ul style="list-style-type: none"> • Audit • Legal • Participating • Primary
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description about the account that's associated with the interaction.</p>
InteractionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

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

Associated Objects

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

[InteractionRelatedAccountChangeEvent on page 956](#)

Change events are available for the object.

[InteractionRelatedAccountFeed on page 960](#)

Feed tracking is available for the object.

InteractionRelatedAccountHistory on page 968

History is available for tracked fields of the object.

InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Notes about the account that's associated with the interaction summary.</p>
DiscussedAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The company or organization mentioned in the interaction summary. This is a relationship field.</p> <p>Relationship Name DiscussedAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
InteractionSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The interaction summary associated with the interaction summary account record.</p>

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

Associated Objects

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

[InteractionSumDiscussedAccountFeed on page 960](#)

Feed tracking is available for the object.

[InteractionSumDiscussedAccountHistory on page 968](#)

History is available for tracked fields of the object.

InteractionSummary

Represents the summary of an interaction, including confidentiality information. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account related to the customer who attended the client interaction.</p>
ConfidentialityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are:</p> <ul style="list-style-type: none">• Confidential• Public
InteractionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The client interaction related to the interaction summary.</p>
InteractionPurpose	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the purpose of the client interaction. Possible values are:</p> <ul style="list-style-type: none"> Deal Execution Meet and Greet Quarterly Check-In
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MeetingNotes	<p>Type textArea</p> <p>Properties Create, Nillable, Update</p> <p>Description The detailed record of what transpired during the client interaction.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The title of the interaction summary, capturing the summary of the interaction.</p>
NextSteps	<p>Type textArea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The next steps that were decided during the interaction.</p>
Offering	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description The offerings that were discussed in the client interaction. Possible values are:</p> <ul style="list-style-type: none"> • Debt Capital Markets • Equity Capital Markets • Mergers and Acquisitions Advisory
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
PartnerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account related to the partner who attended the client interaction.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the record such as an opportunity associated with a client interaction.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the interaction summary.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Draft • Published

Associated Objects

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

[InteractionSummaryFeed on page 960](#)

Feed tracking is available for the object.

[InteractionSummaryHistory on page 968](#)

History is available for tracked fields of the object.

[InteractionSummaryOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[InteractionSummaryShare on page 976](#)

Sharing is available for the object.

InteractionSummaryParticipant

Represents a user with whom an interaction summary is shared. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes about this participant.</p>
InteractionSummaryId	<p>Type reference</p>

Field	Details
	Properties
	Create, Filter, Group, Sort
	Description
	The interaction summary that's shared with this user.
IsActive	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether this participant is active.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the interaction summary participant.
ParticipantId	Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The user or group that the interaction summary is shared with.

Field	Details
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The role assigned to this participant.</p>

Associated Objects

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

[InteractionSummaryParticipantChangeEvent on page 956](#)

Change events are available for the object.

[InteractionSummaryParticipantFeed on page 960](#)

Feed tracking is available for the object.

[InteractionSummaryParticipantHistory on page 968](#)

History is available for tracked fields of the object.

IssuedCard

Represents information about the card issued to a customer, such as debit card, credit card, prepaid card, gift card, and any other card type. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The account associated with the card. This field is a relationship field.</p>
	<p>Relationship Name Account</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Account</p>
BankIdentificationNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The bank identification number on the card.</p>
ExpiryDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of expiry of the card.</p>
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial account associated with the card. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
Format	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Specifies the format of the card, such as Card, Virtual Card, or Token.</p>
IssueDate	<p>Type date</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The date when the card is issued.</p>
LastDigitsCardNumber	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
LastReferencedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p>
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>
	<p>Description The name of the record.</p>
NameOnCard	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name on the card.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PaymentNetwork	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the payment network of the card.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the card. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the financial account card in an external system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the card.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the card type.</p>
ValidFromMonth	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The month from when the card is valid.</p>
ValidFromYear	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The year from when the card is valid.</p>
ValidUntilMonth	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The month until when the card is valid.</p>

Field	Details
ValidUntilYear	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The year until when the card is valid.</p>

Associated Objects

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

[IssuedCardChangeEvent on page 956](#)

Change events are available for the object.

[IssuedCardFeed on page 960](#)

Feed tracking is available for the object.

[IssuedCardHistory on page 968](#)

History is available for tracked fields of the object.

[IssuedCardOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[IssuedCardShare on page 976](#)

Sharing is available for the object.

LoanApplicant

Represents details of the borrower or co-borrower for the loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicantExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
Description	
ID that uniquely identifies imported data in an external data source (if applicable).	
AsianRaceSubType	Type multipicklist
Properties	
Create, Filter, Nillable, Update	
Description	
Borrower's Asian race.	
Possible values are:	
<ul style="list-style-type: none"> • Asian Indian • Chinese • Filipino • Japanese • Korean • Other • Vietnamese 	
BorrowerType	Type picklist
Properties	
Create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
Description	
Applicant's borrower type.	
Values are:	
<ul style="list-style-type: none"> • Borrower • CoBorrower 	
CitizenshipStatus	Type picklist
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
Borrower's citizenship status.	
Possible values are:	
<ul style="list-style-type: none"> • Non-Permanent Resident Alien • Permanent Resident Alien • U.S. Citizen 	

Field	Details
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Contact associated with this borrower.</p>
DependentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's number of dependents.</p>
DependentsAge	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Ages of borrower's dependents in a comma-separated list.</p>
EthnicitySubType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Borrower's ethnicity origin. Possible values are: <ul style="list-style-type: none"> • Cuban • Mexican • Other • Puerto Rican </p>
EthnicityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's ethnicity. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Hispanic or Latino • I do not wish to provide this information • Not Hispanic or Latino
GenderType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's gender.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Female • I do not wish to provide this information • Male
HasMilitaryService	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the borrow is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.</p>
IsActiveMilitary	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower is currently on active duty with the United States Armed Forces.</p>
IsJointCredit	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower is applying for joint credit.</p>
IsSurvivingMilitarySpouse	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether borrower is a surviving spouse of a veteran.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Loan application associated with this borrower.</p>
MaritalStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's marital status. Possible values are:</p> <ul style="list-style-type: none"> • Married • Separated • Unmarried
MilitaryTourExpirationMonth	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Month that borrower's tour of service expires.</p>
MilitaryTourExpirationYear	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Year that borrower's tour of service expires.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan applicant.</p>
OtherAsianRaceSubType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's Asian race if other is specified.</p>
OtherEthnicitySubType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's ethnicity if other is selected.</p>
OtherPacIslandSubType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's native Hawaiian or Pacific Islander race if other is specified.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
Description	
ID of the user who owns this record.	
PacIslandSubType	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Update
Description	
Borrower's native Hawaiian or Pacific Islander race.	
Possible values are:	
<ul style="list-style-type: none"> • Guamanian or Chamorro • Native Hawaiian • Other • Samoan 	
PreferredLanguage	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
Description	
Borrower's preferred communication language.	
Possible values are:	
<ul style="list-style-type: none"> • Chinese • English • I do not wish to respond • Korean • Other • Spanish • Tagalog • Vietnamese 	
RaceType	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Update
Description	
Borrower's race.	
Possible values are:	
<ul style="list-style-type: none"> • American Indian or Alaska Native 	

Field	Details
	<ul style="list-style-type: none"> • Asian • Black or African American • I do not wish to provide this information • Native Hawaiian or Other Pacific Islander • White
TribeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of borrower's enrolled or principal tribe.</p>
WasActiveMilitary	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower is currently retired, discharged, or separated from active military duty.</p>
WasNonActivatedService	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.</p>

Associated Objects

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

LoanApplicantFeed

Feed tracking is available for the object.

LoanApplicantHistory

History is available for tracked fields of the object.

LoanApplicantOwnerSharingRule

Sharing rules are available for the object.

LoanApplicantShare

Sharing is available for the object.

LoanApplicantAddress

Represents borrower's or co-borrower's current address information. This object is available in API version XX.0 and later.

Supported Calls

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

Fields

Field	Details
AddressExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
AddressOwnership	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies borrower's status at residence. Possible values are: <ul style="list-style-type: none"> • Live Rent-Free • Own • Rent </p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description
	<p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	Borrower associated with this applicant address.
LoanApplicationId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Loan application associated with this applicant address.
MonthlyRentPayment	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly rent payment (if applicable).
Name	Type
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the borrower's address.
ResidenceAdditionalMonthCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Additional months borrower lived at this residence.
ResidenceAddress	Type
	address

Field	Details
	<p>Properties Filter, Nillable</p> <p>Description Residence's physical address.</p>
ResidenceCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address city.</p>
ResidenceCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address country.</p>
ResidenceGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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.</p>
ResidenceLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
ResidenceLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
ResidencePostalCode	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address postal code.
ResidenceState	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address state.
ResidenceStreet	Type
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address street.
ResidenceYearCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Years borrower lived at this residence.
ResidencyType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Identifies borrower's residency status at address.
	Possible values are:
	• Former Residence
	• Mailing Address

Field	Details
	<ul style="list-style-type: none"> Present Address

Associated Objects

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

[LoanApplicantAddressFeed](#)

Feed tracking is available for the object.

[LoanApplicantAddressHistory](#)

History is available for tracked fields of the object.

LoanApplicantAsset

Represents a junction between a borrower and a loan application asset. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the borrower associated with the asset.</p>
LoanApplicationAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the loan application associated with the asset.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
Role	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies borrower's ownership role for the asset. Possible values are:</p> <ul style="list-style-type: none"> • Co-Holder • Primary <p>The default value is Co-Holder.</p>

Associated Objects

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

[LoanApplicantAssetHistory](#)

History is available for tracked fields of the object.

LoanApplicantDeclaration

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
BankruptcyType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Bankruptcy type or types (if applicable). Possible values are:</p> <ul style="list-style-type: none"> • Chapter 11 • Chapter 12 • Chapter 13 • Chapter 7
BorrowedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount of money borrowed for loan application transaction.</p>
DeclarationExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
HasBorrowedMoney	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower is borrowing money for loan application transaction.</p>

Field	Details
HasDeclaredBankruptcy	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower declared bankruptcy within the past seven years.
HasDeedSurrender	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower conveyed title to a property in lieu of foreclosure in past 7 years.
HasOutstandingJudgement	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether there are one or more outstanding judgments against the borrower.
HasOwnershipInterest	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower had ownership interest in a property in the last 3 years.
HasPastShortSale	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past 7 years.
HasPropertyForeclosed	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower had property foreclosed upon in last 7 years.
HasUndisclAddlCreditApp	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.
HasUndisclAddlPropApp	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.
IsCoSignerUndisclDebt	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.
IsPartyToLawsuit	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is party to lawsuit with potential personal financial liability.
IsPresentlyDelinquent	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.

Field	Details
IsPrimaryResidence	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether property to be borrower's primary residence.</p>
IsRelatedToSeller	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).</p>
IsSubjectToPriorityLien	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description ID of the borrower making these declarations.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the loan application associated with these declarations.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan application declaration.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>
PriorPropertyTitleType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies how borrower held title in the ownership interest property. Possible values are:</p> <ul style="list-style-type: none"> • Joint With Other Than Spouse • Joint With Spouse • Yourself
PriorPropertyUsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies type of property borrower held ownership interest in.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Investment Property • Primary Residence • Second Home • Secondary Residence

Associated Objects

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

[LoanApplicantDeclarationFeed](#)

Feed tracking is available for the object.

[LoanApplicantDeclarationHistory](#)

History is available for tracked fields of the object.

[LoanApplicantDeclarationOwnerSharingRule](#)

Sharing rules are available for the object.

[LoanApplicantDeclarationShare](#)

Sharing is available for the object.

LoanApplicantEmployment

Represents details about the borrower's or co-borrower's current and past employment. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
CurrentJobAdditionalMonthCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional number of months employed at this job (less than 12).</p>

Field	Details
CurrentJobYearCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of full years employed at this job.</p>
EmployerAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description Address of borrower's employer or business.</p>
EmployerCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address city.</p>
EmployerCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address country.</p>
EmployerGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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.</p>
EmployerLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
EmployerLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
EmployerName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of borrower's employer or business.</p>
EmployerPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Employer's phone number.</p>
EmployerPostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address postal code.</p>
EmployerState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address state.</p>
EmployerStreet	<p>Type textarea</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The address street.
EmploymentExtIdentifier	Type string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
EndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Borrower's last date of employment at this job.
IsLessThanQuarterShare	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower owns less than 25 percent of this business (if applicable).
IsRelToTransactionParty	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.
IsSelfEmployed	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is self-employed or owns the business.

Field	Details
JobTitle	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The borrowers job title or employer's business or industry type.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the borrower associated with employment details.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the loan application associated with this borrower's employment information.</p>
MonthlyBaseIncomeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	Borrower's base monthly income from this job.
MonthlyBonusAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly bonus from this job.
MonthlyCommissionAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly commission from this job.
MonthlyIncome	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly income or loss from this business.
MonthlyMilitaryEntlAmt	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly military entitlement from this job.
MonthlyOtherIncomeAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's other monthly income from this job.
MonthlyOvertimeAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	<p>Description Borrower's monthly overtime income from this job.</p>
MonthlyTotalIncomeAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Borrower's total monthly income from this job.</p> <p>Formula</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> $\text{MonthlyBaseIncomeAmount} + \text{MonthlyOvertimeAmount} + \text{MonthlyBonusAmount} + \text{MonthlyCommissionAmount} + \text{MonthlyMilitaryEntlAmt} + \text{MonthlyOtherIncomeAmount}$ </div>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan applicant employment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date borrower started working at this job.</p>

Associated Objects

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

[LoanApplicantEmploymentFeed](#)

Feed tracking is available for the object.

LoanApplicantEmploymentHistory

History is available for tracked fields of the object.

LoanApplicantEmploymentOwnerSharingRule

Sharing rules are available for the object.

LoanApplicantEmploymentShare

Sharing is available for the object.

LoanApplicantIncome

Represents details about the borrower and co-borrower current monthly income. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
IncomeExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
IncomeSourceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Source of borrower's monthly non-employment income.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Alimony • Automobile Allowance • Boarder Income • Capital Gains • Child Support • Disability • Foster Care

Field	Details
	<ul style="list-style-type: none"> • Housing or Parsonage • Interest and Dividends • Mortgage Credit Certificate • Mortgage Differential Payments • Notes Receivable • Other • Public Assistance • Retirement • Royalty Payments • Separate Maintenance • Social Security • Trust • Unemployment Benefits • VA Compensation
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the borrower associated with this income.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description ID of the loan application associated with this income or expense.</p>
MonthlyIncomeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount of the borrower's monthly non-employment income from this source.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the other monthly income.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>

Associated Objects

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

[LoanApplicantIncomeFeed](#)

Feed tracking is available for the object.

[LoanApplicantIncomeHistory](#)

History is available for tracked fields of the object.

[LoanApplicantIncomeOwnerSharingRule](#)

Sharing rules are available for the object.

[LoanApplicantIncomeShare](#)

Sharing is available for the object.

LoanApplicantLiability

Represents a junction between a borrower and a loan application liability. This object is available in API version 47.0 and later.

xxx

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the borrower associated with the liability.</p>
LoanApplicationLiabilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the loan application associated with the liability.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to this record.</p>

Field	Details
Role	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies borrower's ownership role for the liability.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Co-Holder • Primary <p>The default value is Co-Holder.</p>

Associated Objects

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

[LoanApplicantLiabilityHistory](#)

History is available for tracked fields of the object.

LoanApplicationAsset

Represents details about the borrower's and co-borrower's current personal and real property. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
AccountNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account number associated with financial institution holding asset.</p>
AccountType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies asset account type. Possible values are:</p> <ul style="list-style-type: none"> • Bonds • Bridge Loan Proceeds • Cash Value of Life Insurance • Certificate of Deposit • Checking • Individual Development Account • Money Market • Mutual Fund • Retirement • Stock Options • Stocks • Trust Account
AssetClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies which asset class total to include the asset's value in. Possible values are:</p> <ul style="list-style-type: none"> • Financial • Other • Real Estate
AssetExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
AssetType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies type of other asset. Possible values are:</p> <ul style="list-style-type: none"> • Earnest Money • Employer Assistance • Other • Proceeds from Real Estate Property to be sold on or before closing • Proceeds from Sale of Non-Real Estate Asset • Rent Credit • Secured Borrowed Funds • Sweat Equity • Trade Equity • Unsecured Borrowed Funds
CashOrMarketValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Asset's cash or current market value.</p>
DispositionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Real estate asset's planned future use. Possible values are:</p> <ul style="list-style-type: none"> • Pending Sale • Retained • Sold
FinancialInstitutionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	Name of financial institution where financial account is held.
GrossMonthlyRentalIncome	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Borrower's monthly rent income collected on real estate asset.
IsJointAsset	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates asset is held jointly.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicationId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the loan application associated with this asset.
Name	Type string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan application asset.</p>
NetMonthlyRentalIncome	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Borrower's net monthly income on real estate asset.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>
PresentMarketValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cash value of real estate asset if sold today.</p>
RealEstateAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description Real estate asset's address.</p>
RealEstateCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address city.</p>
RealEstateCountry	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The address country.</p>
RealEstateGeocodeAccuracy	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>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.</p>
RealEstateLatitude	<p>Type double</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
RealEstateLongitude	<p>Type double</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
RealEstateMonthlyExpense	<p>Type currency</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.</p>
RealEstatePostalCode	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The address postal code.</p>
RealEstateState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address state.</p>
RealEstateStreet	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address street.</p>

Associated Objects

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

[LoanApplicationAssetFeed](#)

Feed tracking is available for the object.

[LoanApplicationAssetHistory](#)

History is available for tracked fields of the object.

[LoanApplicationAssetOwnerSharingRule](#)

Sharing rules are available for the object.

[LoanApplicationAssetShare](#)

Sharing is available for the object.

LoanApplicationFinancial

Represents transaction details for a loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
BorrowerClosingCostAmt	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total closing costs due from borrower, including prepaid and initial escrow payments.</p>
CashFromOrToBorrowerAmt	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification.</p> <p>Formula</p> <pre>PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount - LoanExclFinMortInsAmt - FinancedMortgageInsAmt - CreditFromSeller - OtherCredit</pre>
CounselingAgencyName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown</p>
CounselingAgencyProvName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.</p>
CounselingComplBorrName	<p>Type string</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Name of borrower or borrowers who completed housing counseling.
CounselingCompletionDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date borrower completed housing counseling.
CreditFromSeller	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total amount of closing costs due from seller.
DiscountPointCostAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total cost of discount points purchased by the borrower due at closing.
EdCompletedBorrowerName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Name of borrower or borrowers who completed homeownership education.
EstFirstMortgagePmtAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed monthly first mortgage payment for loan application property, including principal and interest.

Field	Details
EstHomeownersInsPmtAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed monthly payment for homeowners insurance on application property.
EstMortgageInsPmtAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed monthly mortgage insurance payment on application property.
EstOtherDuesPaymentAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.
EstOtherPaymentAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed total monthly payment for other housing expenses on application property.
EstPropertyTaxesPmtAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Proposed monthly payment for real estate taxes on application property.
EstSubordinateLienPmtAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description
	<p>Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.</p>
EstSuppPropertyInsPmtAmt	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.</p>
FinancedMortgageInsAmt	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>Total amount of financed mortgage insurance or financed mortgage insurance equivalent.</p>
FinancialExtIdentifier	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p>
	Description
	<p>ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
HasCompletedCounseling	Type
	<p>boolean</p>
	Properties
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	Description
	<p>Indicates whether one or more borrowers completed housing counseling within the last 12 months.</p>
HasHoEducation	Type
	<p>boolean</p>
	Properties
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	Description
	<p>Indicates whether one or more borrowers completed homeownership education within the last 12 months.</p>

Field	Details
HoEducationCompletedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date borrower completed homeownership education.</p>
HoEducationFormat	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the format of homeownership education attended by borrower.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Attended Workshop in Person • Completed Web-Based Workshop
HousingCounselingFormat	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the format of the housing counseling completed by borrower.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Face-to-Face • Internet • Telephone
HudApprAgencyIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.</p>
HudApprovedProvIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.</p>
LandAcquiredSeparatelyAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Price of land if purchased separately from the building or structure.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total amount of loan including financed mortgage insurance or mortgage insurance equivalent.</p> <p>Formula</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> $\text{LoanExclFinMortInsAmt} + \text{FinancedMortgageInsAmt}$ </div>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	Description ID of the loan application associated with this loan transaction.
LoanExclFinMortInsAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the loan application financial.
OtherCredit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.
OtherNewMortgageLoanAmt	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.
OutstandingLoanAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total amount of all mortgage loans on application property to be paid off by refinance loan.

Field	Details
PurchasePriceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Purchase price for the property.</p>
RemodelAndRepairsAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cost of any alterations, improvements, and repairs on the property.</p>
TotalCashDueFromBorrower	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total cash due from borrower at closing.</p> <p>Formula</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> $\text{PurchasePriceAmount} + \text{RemodelAndRepairsAmount} + \text{LandAcquiredSeparatelyAmount} + \text{OutstandingLoanAmount} + \text{TotalDebtPaidOffAmount} + \text{BorrowerClosingCostAmt} + \text{DiscountPointCostAmount}$ </div>
TotalCredit	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total borrower credits.</p> <p>Formula</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> $\text{CreditFromSeller} + \text{OtherCredit}$ </div>
TotalDebtPaidOffAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.</p>
TotalEstPaymentAmt	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Proposed total monthly payment for application property.</p> <p>Formula</p> <pre>EstFirstMortgagePmtAmt + EstSubordinateLienPmtAmt + EstHomeownersInsPmtAmt + EstSuppPropertyInsPmtAmt + EstPropertyTaxesPmtAmt + EstMortgageInsPmtAmt + EstOtherDuesPaymentAmt + EstOtherPaymentAmt</pre>
TotalMortgageLoanAndCreditAmt	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total mortgage loans plus total credits.</p> <p>Formula</p> <pre>LoanExclFinMortInsAmt + FinancedMortgageInsAmt + CreditFromSeller + OtherCredit</pre>
TotalMortgageLoansAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total amount of loan.</p> <p>Formula</p> <pre>LoanExclFinMortInsAmt + FinancedMortgageInsAmt</pre>

Associated Objects

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

[LoanApplicationFinancialFeed](#)

Feed tracking is available for the object.

LoanApplicationFinancialHistory

History is available for tracked fields of the object.

LoanApplicationLiability

Represents details about the borrower and co-borrower current liabilities. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
AccountNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's account number with lender or creditor.</p>
AccountType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Personal debt borrower owes like credit card balances, other debts, and leases. Possible values are:<ul style="list-style-type: none">• Installment• Lease• Open 30-Day• Other• Revolving</p>
CreditLimitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Credit limit of real estate loan or line of credit.</p>

Field	Details
CreditorName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lender or creditor owed the debt.</p>
IsJointLiability	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LiabilityClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Include the liability's monthly payment in this liability class monthly payment total. Possible values are:</p> <ul style="list-style-type: none"> • Financial • Other • Real Estate
LiabilityExtIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
LoanApplicationAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description ID of the loan application real estate asset associated with a real estate liability.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description ID of the loan application associated with this liability.</p>
LoanType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Existing real estate loan type. Possible values are:</p> <ul style="list-style-type: none"> • Conventional • Federal Housing Authority • Other • USDA or Rural Housing Service • Veterans Affairs
MonthlyPaymentAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Borrower's monthly payment required to keep debt account current.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan application liability.</p>
OtherLiabilityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies type of other borrower expense or liability.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Alimony • Child Support • Job Related Expenses • Other • Separate Maintenance
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>
ShouldBePaidInFull	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower to pay off debt on or before closing.</p>
UnpaidBalanceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Unpaid liability balance when borrower completed loan application.</p>

Associated Objects

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

[LoanApplicationLiabilityFeed](#)

Feed tracking is available for the object.

[LoanApplicationLiabilityHistory](#)

History is available for tracked fields of the object.

[LoanApplicationLiabilityOwnerSharingRule](#)

Sharing rules are available for the object.

[LoanApplicationLiabilityShare](#)

Sharing is available for the object.

LoanApplicationProperty

Represents details of the property the loan application finances. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
ExpMonthlyRentalIncome	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.</p>
ExpNetMonthlyRentalInc	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.</p>
IsManufacturedHome	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether application property is a manufactured home.</p>
IsMixedUseProperty	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether application property includes commercial space set aside for business use.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Loan application associated with this property.</p>
LoanPurposeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description What the borrower will use the loan for.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Other • Purchase • Refinance
Name	<p>Type</p>
	string
	<p>Properties</p>
	Create, Filter, Group, idLookup, Sort, Update
	<p>Description</p>
	Name of the loan application property.
PropertyAddress	<p>Type</p>
	address
	<p>Properties</p>
	Filter, Nillable
	<p>Description</p>
	Physical address of the property to be financed.
PropertyCity	<p>Type</p>
	string
	<p>Properties</p>
	Create, Filter, Group, Nillable, Sort, Update
	<p>Description</p>
	The address city.
PropertyCountry	<p>Type</p>
	string
	<p>Properties</p>
	Create, Filter, Group, Nillable, Sort, Update
	<p>Description</p>
	The address country.
PropertyExtIdentifier	<p>Type</p>
	string
	<p>Properties</p>
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	<p>Description</p>
	ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.

Field	Details
PropertyGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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.</p>
PropertyLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
PropertyLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
PropertyPostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address postal code.</p>
PropertyState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address state.</p>
PropertyStreet	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address street.</p>
PropertyUseType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Borrower's stated use for the property.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • FHA Secondary Residence • Investment Property • Primary Residence • Secondary Residence
PropertyValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Estimated present market value of the application property.</p>
RequestedLoanAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total loan amount the borrower is applying for.</p>
UnitsFinancedCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of units being financed at this address.</p>

Associated Objects

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

[LoanApplicationPropertyFeed](#)

Feed tracking is available for the object.

[LoanApplicationPropertyHistory](#)

History is available for tracked fields of the object.

LoanApplicationTitleHolder

Represents details of borrowers who are applying to hold title to the property the loan application finances. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
IsCurrentTitleHolder	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether person is a current title holder on property to be refinanced.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
LoanApplicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Loan application associated with this title holder.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the loan application title holder.</p>
TitleHolderExtIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.</p>
TitleHolderName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the person on the title for the property associated with the loan application.</p>

Associated Objects

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

[LoanApplicationTitleHolderFeed](#)

Feed tracking is available for the object.

[LoanApplicationTitleHolderHistory](#)

History is available for tracked fields of the object.

MultipartyInfoAuthRequest

Tracks a request for multiple parties of authorization on a Data Use Purpose. For example, consent requests to share the required documents to open a joint financial account or share mortgage disclosures to loan applicants (borrower + co-borrower). This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
AuthorizationType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The number of parties needed for consent- all parties must accept / majority parties need to consent or at least one party must consent.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • All • Any • HalfOrMajority—Half or Majority • Majority <p>The default value is 'All'.</p>
DataUsePurposeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Reference to the purpose of this request.</p> <p>This is a relationship field.</p> <p>Relationship Name DataUsePurpose</p> <p>Relationship Type Lookup</p> <p>Refers To DataUsePurpose</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the info authorization request record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ResponseStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The consentees' aggregate response to this request, based on the authorization type.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • New • Rejected • Seen • Signed <p>The default value is 'New'.</p>
SourceRecordId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p> <p>Description</p> <p>The record from which this consent request is created.</p> <p>This is a relationship field.</p> <p>Relationship Name</p> <p>SourceRecord</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task</p>

Associated Objects

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

[MultipartyInfoAuthRequestChangeEvent on page 956](#)

Change events are available for the object.

[MultipartyInfoAuthRequestFeed on page 960](#)

Feed tracking is available for the object.

[MultipartyInfoAuthRequestHistory on page 968](#)

History is available for tracked fields of the object.

[MultipartyInfoAuthRequestShare on page 976](#)

Sharing is available for the object.

OpportunityParticipant

Represents information about a participant in the context of an opportunity record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes about this participant.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this participant is active.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An automatically generated name for the participant.</p>
OpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the opportunity related to the participant.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the user or group related to the participant.</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the object-based role for this participant.</p>

Associated Objects

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

[OpportunityParticipantChangeEvent on page 956](#)

Change events are available for the object.

[OpportunityParticipantFeed on page 960 \(API version 52.0\)](#)

Feed tracking is available for the object.

[OpportunityParticipantHistory on page 968 \(API version 52.0\)](#)

History is available for tracked fields of the object.

PartyBusinessRegion

Represents the trading regions of a party, covering both domestic and international locations, where the business entity is actively involved in trading activities. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
BusinessRegionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the name of the region where business activities are conducted.</p>
BusinessRegionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of geographical region where business activities are conducted.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The date when the party stopped the trade activities with the country.</p>
IsActiveTradeRegion	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether a business entity is currently trading in the region (true) or not (false).</p>
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	<p>A unique number that represents the party business region.</p>
OwnerId	Type
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>ID of the user who created the record.</p>
	<p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party profile associated with the party business region. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with the relationship. This field is a relationship field.</p> <p>Relationship Name RecordType</p> <p>Relationship Type Lookup</p> <p>Refers To RecordType</p>
RegionReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country or state where the business activities are conducted.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name RegionReferenceObject</p> <p>Relationship Type Lookup</p> <p>Refers To GeoCountry, GeoState</p>
RegionRevenuePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the overall revenue contributed by the party trading region.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party started the trade activities with the country.</p>
TradeType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the type of financial transfer associated with the party.</p>

PartyCertifiedCapacity

Represents the information captured from the certificate of capacity, such as the party's capacity to work, a timeline for recovery, and return to work. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
Capacity	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of capacity the party is able to work.</p>
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Claim associated with the Party Certified Capacity. This field is a relationship field.</p> <p>Relationship Name Claim</p> <p>Relationship Type Lookup</p> <p>Refers To Claim</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveEndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the period the certificate is effective for.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the period the certificate is effective for.</p>
ExpectedWorkReturnDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The expected date the party returns to work.</p>
FullCapacityFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the party has the full capacity to work.</p>
IssueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date the certificate was issued.</p>
IssuerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The Issuer of the Party Certified Capacity. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Issuer</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, HealthcareProvider</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the party certified capacity.</p>
NoCapacityEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the certified period in which the party has no capacity to work.</p>
NoCapacityStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The start date of the certified period in which the party has no capacity to work.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Owner associated with the Party Certified Capacity. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartialCapacityEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the certified period in which the party has some capacity to work.</p>
PartialCapacityStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the certified period in which the party has some capacity to work.</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The Party associated with the Party Certified Capacity. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Account, ClaimParticipant, Contact</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the certificate. Possible values are:<ul style="list-style-type: none">• Active• Expired• Pending Approval• Submitted</p>
UsageType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Internal field. Specifies the application using the entity to populate data. Possible values are:<ul style="list-style-type: none">• Claim</p>

Associated Objects

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

[PartyCertifiedCapacityChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[PartyCertifiedCapacityFeed on page 960](#)

Feed tracking is available for the object.

[PartyCertifiedCapacityHistory on page 968](#)

History is available for tracked fields of the object.

[PartyCertifiedCapacityOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyCertifiedCapacityShare on page 976](#)

Sharing is available for the object.

PartyCreditProfile

Represents the credit score details for a party. This object is available in API version 60 and later.

Supported Calls

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

Fields

Field	Details
CreditBureauName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the credit bureau providing the credit profile information.</p>
CreditPrflReportIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the credit profile report from the credit bureau for a party profile.</p>
CreditScore	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The credit score of the party profile.</p>
CreditScoreDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the credit score of the party profile was accessed.</p>
IsVerified	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the party credit profile is verified (true) or not (false). Possible values are:</p> <ul style="list-style-type: none"> • Verification Unsuccessful • Verified
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party credit profile record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile that's associated with the risk assessment. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Refers To Account, Applicant, Contact, PartyProfile</p>
TotalExposureAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of outstanding loans of applicant, from all banks.</p>

Associated Objects

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

PartyCreditProfileChangeEvent on page 956

Change events are available for the object.

PartyCreditProfileFeed on page 960

Feed tracking is available for the object.

PartyCreditProfileHistory on page 968

History is available for tracked fields of the object.

PartyCreditProfileOwnerSharingRule on page 973

Sharing rules are available for the object.

PartyCreditProfileShare on page 976

Sharing is available for the object.

PartyExpense

Represents the expense incurred by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicationFormId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the application form. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Refers To ApplicationForm</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, contains the currency ISO code associated with the record.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • USD—U.S. Dollar <p>The default value is USD.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the expense.</p>
ExpensesAsOfDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party expense is documented.</p>
IsReadOnly	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party expense is read only (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the expense.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PartyFinancialLiabilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party financial liability that's associated with the party expense. This field is a relationship field.</p> <p>Relationship Name PartyFinancialLiability</p> <p>Refers To PartyFinancialLiability</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party associated with the expense. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p>

Field	Details
	<p>Refers To Account, Applicant, Contact, PartyProfile</p>
PartyProfileId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the party profile. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Refers To PartyProfile</p>
RecurrenceInterval	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The interval after which the expense is incurred. Possible values are:</p> <ul style="list-style-type: none"> • Bi-Weekly • Monthly • One Time • Weekly • Yearly
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the party expense.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
TotalAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The total expense amount.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of expense.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Child Care • Child Support • Clothing • Debt • Entertainment • Food & Dining • Garnishments • Gas • Gifts • Health and Hospitalization Insurance Premiums • Housing • Insurance • Medical Prescriptions and Expenses • Miscellaneous • Mobile Device • Mortgage • Personal Care • Reimbursement • Representative Payee • Shopping • Spousal Support

Field	Details
	<ul style="list-style-type: none"> • Subscriptions • Transportation • Travel • Utilities
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The usage type of the party expense. Possible values are:</p> <ul style="list-style-type: none"> • CashFlow—Cash Flow • Claim • VehicleAndAssetLoanOrigination—Vehicle And Asset Loan Origination
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party expense information was verified.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The verification status of the party expense.</p>

PartyFinancialAsset

Represents information about the financial asset owned by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant associated with the financial asset. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset owned by the party. This field is a polymorphic relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is USD.</p>

Field	Details
	<p>The default value is USD.</p>
DeclarationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the asset is declared.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the asset.</p>
IsLienExisting	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicate whether there is a lien on the financial asset. The default value is <code>false</code>.</p>
IsReadOnly	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party financial asset is read only (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record.</p>
MakeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The make name of the asset.</p>
ModelName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The model name of the asset.</p>
ModelYear	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The model year of the asset.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party financial asset.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the party financial asset record.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
OwnershipEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the ownership of the asset ends.</p>
OwnershipPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The share owned by the party in percentage.</p>
OwnershipStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the ownership of the asset starts.</p>
OwnershipType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ownership type of the asset.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Individual • Joint
PartyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party that owns the asset. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Applicant, Contact, PartyProfile</p>
PartyProfileId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The party profile that owns the financial asset. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Refers To PartyProfile</p>
PayoffDueAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The payoff due amount of the party financial asset.</p>
PledgeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the party pledges as a collateral against a financial asset.</p>
PurchaseAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the party paid for the financial asset.</p>
SerialNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The serial number of the financial asset.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the party asset in an external system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the asset. Valid values are:<ul style="list-style-type: none"> • Active • Inactive </p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of asset.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description The usage type of the party financial asset. Valid values are: <ul style="list-style-type: none"> • CashFlow—Cash Flow • Claim • VehicleAndAssetLoanOrigination—Loan Origination </p>
ValuationAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The worth of the asset after valuation.</p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the asset valuation was done.</p>
ValuationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the asset valuation was done.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The verification status of the party financial asset.</p>

Associated Objects

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

partyfinancialassetFeed on page 960

Feed tracking is available for the object.

partyfinancialassetHistory on page 968

History is available for tracked fields of the object.

PartyFinancialAssetLien

Represents information about the lien of the financial asset owned by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the lien is active. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LienAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of the lien.</p>
LienHolder	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the lien holder.</p>
MaturityDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maturity date of the lien.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party financial asset lien.</p>
PartyFinancialAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial asset associated with the lien. This field is a relationship field.</p> <p>Relationship Name PartyFinancialAsset</p> <p>Relationship Type Master-detail</p> <p>Refers To PartyFinancialAsset (the master object)</p>

Associated Objects

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

[PartyFinancialAssetLienChangeEvent on page 956](#)

Change events are available for the object.

[PartyFinancialAssetLienFeed on page 960](#)

Feed tracking is available for the object.

[PartyFinancialAssetLienHistory on page 968](#)

History is available for tracked fields of the object.

[PartyFinancialAssetLienOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyFinancialAssetLienShare on page 976](#)

Sharing is available for the object.

PartyFinclAssetAddlOwner

Represents information about the additional owner of an asset. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the additional owner. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To
	Account
ApplicantId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The applicant associated with the additional owner of the financial asset.
	This field is a relationship field.
	Relationship Name
	Applicant
	Relationship Type
	Lookup
	Refers To
	Applicant
ContactId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact associated with the additional owner.
	This field is a relationship field.
	Relationship Name
	Contact
	Relationship Type
	Lookup
	Refers To
	Contact
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date when a user referenced this record.
LastViewedDate	Type
	dateTime

Field	Details
	Properties Filter, Nillable, Sort
	Description The most recent date when a user viewed this record.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the record.
OwnershipSharePercent	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage of the asset ownership between the primary and additional owner.
PartyFinancialAssetId	Type reference
	Properties Create, Filter, Group, Sort
	Description The asset associated with the additional owner. This field is a relationship field.
	Relationship Name PartyFinancialAsset
	Relationship Type Lookup
	Refers To PartyFinancialAsset
PartyProfileId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The party profile associated with the additional owner of the financial asset. This field is a relationship field.

Field	Details
	<p>Relationship Name PartyProfile</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To PartyProfile</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the additional owner of the party asset in an external system.</p>

Associated Objects

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

[PartyFinlAssetAddlOwnerChangeEvent on page 956](#)

Change events are available for the object.

[PartyFinlAssetAddlOwnerFeed on page 960](#)

Feed tracking is available for the object.

[PartyFinlAssetAddlOwnerHistory on page 968](#)

History is available for tracked fields of the object.

PartyFinancialLiability

Represents information about a financial liability held by a party. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The account associated with the party financial liability. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant who submitted the application. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Refers To Applicant</p>
ApplicationFormId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The application that's submitted for a party financial liability. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Refers To ApplicationForm</p>

Field	Details
ContactId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The contact associated with the party financial liability. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is USD. The default value is USD.</p>
DeclarationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the asset is declared.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the obligations or responsibilities linked to the liability ends.</p>
EstimatedMonthlyPayment	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The estimated monthly payment.</p>
InterestRate	Type
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The interest rate of the party financial liability.</p>
IsLienExisting	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicate whether there is a lien on the financial asset.</p>
	<p>The default value is <code>false</code>.</p>
IsReadOnly	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the party financial liability is read only.</p>
	<p>The default value is <code>false</code>.</p>
IsRepaymentActive	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the party financial liability is being paid.</p>
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date when a user referenced this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Lender	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The branch unit that owns the party financial liability.</p>
LiabilityAccountIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the liability account.</p>
MakeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The make name of the asset.</p>
ModelName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The model name of the asset.</p>
ModelYear	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The model year of the asset.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OutstandingBalance	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The remaining amount of the liability that the party owes.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
OwnershipEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the ownership of the asset ends.</p>
OwnershipPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The share owned by the party in percentage.</p>

Field	Details
OwnershipStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the ownership of the asset starts.</p>
OwnershipType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ownership type of the asset.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Individual • Joint
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party, such as account, contact, or party profile associated with the party financial liability.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Applicant, Contact, PartyProfile</p>
PartyProfileId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Party profile associated with the party financial liability.</p> <p>This field is a relationship field.</p> <p>Relationship Name PartyProfile</p>

Field	Details
	<p>Refers To PartyProfile</p>
PayoffDueAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The payoff due amount of the party financial asset.</p>
PledgeAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the party pledges as a collateral against a financial asset.</p>
PurchaseAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the party paid for the financial asset.</p>
SerialNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The serial number of the financial asset.</p>
SharePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the financial liability held by the party.</p>
ShareType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The share type of the financial liability.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Individual • Joint
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The unique identifier of the party financial liability in an external system.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date at which the obligations or responsibilities linked to the liability begins.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The status of the financial liability.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Active • Inactive
Term	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The remaining term in months of the party financial liability.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description The type of financial liability. Possible values are:</p> <ul style="list-style-type: none"> • Alimony • Auto Loan • Installment • Personal Loan
UsageType	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The usage type of the party financial asset. Valid values are:</p> <ul style="list-style-type: none"> • CashFlow—Cash Flow • Claim • LoanOrigination—Loan Origination
ValuationAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The worth of the asset after valuation.</p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date when the asset valuation was done.</p>
ValuationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the asset valuation was done.</p>

Field	Details
Value	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value of the financial liability.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The verification status of the party financial liability.</p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party financial liability was verified.</p>

Associated Objects

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

[PartyFinancialLiabilityChangeEvent on page 956](#)

Change events are available for the object.

[PartyFinancialLiabilityFeed on page 960](#)

Feed tracking is available for the object.

[PartyFinancialLiabilityHistory on page 968](#)

History is available for tracked fields of the object.

[PartyFinancialLiabilityShare on page 976](#)

Sharing is available for the object.

[PartyFinclLiabAddlBrwr](#)

Represents information about an additional party associated with a financial liability. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the financial liability additional party. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant associated with the additional borrower of the financial liability. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Relationship Type Lookup</p> <p>Refers To Applicant</p>
ContactId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact associated with the financial liability additional party. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
PartyFinancialLiabilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial liability held by the additional party. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name PartyFinancialLiability</p> <p>Relationship Type Lookup</p> <p>Refers To PartyFinancialLiability</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile associated with the additional borrower of the financial liability. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
SharePercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the financial liability held by the additional party.</p>
SourceSystemIdentifier	<p>Type external lookup</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier of the additional party associated with the financial liability in an external system.</p>

Associated Objects

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

PartyFinclLiabAddlBrwrChangeEvent on page 956

Change events are available for the object.

PartyFinclLiabAddlBrwrFeed on page 960

Feed tracking is available for the object.

PartyFinclLiabAddlBrwrHistory on page 968

History is available for tracked fields of the object.

PartyIncome

Represents the income of an individual or a business entity. This income can be from salaries, commissions, fees, rental properties, and other sources. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicationFormId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The application form that's submitted for a party income. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationForm</p>
CalendarYear	<p>Type int</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The calendar year when the income was earned.</p>

Field	Details
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim associated with the party income. This field is a relationship field.</p> <p>Relationship Name Claim</p> <p>Relationship Type Lookup</p> <p>Refers To Claim</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Valid values are:</p> <ul style="list-style-type: none"> • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EmployerAddress	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The compound form of the employer's address.</p>
EmployerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The employer associated with the party income. This field is a relationship field.</p>
	<p>Relationship Name Employer</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Account</p>
EmployerName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the employer.</p>
EmployerPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phone number of the employer.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date when the party income ends.</p>
IncomeAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount of the party income.</p>
IncomeAsOfDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The date when the party income is documented.</p>
IncomeFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The frequency of the party income.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Monthly • One Time • Weekly • Yearly
IncomeSourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source of the income.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name IncomeSource</p> <p>Relationship Type Lookup</p> <p>Refers To PartyFinancialAsset, PersonEmployment</p>
IncomeStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the party income.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive

Field	Details
IncomeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of the income. Valid values are:</p> <ul style="list-style-type: none"> • Salary • Commission— • Fees— • Rent— • Bonus • Dividend • Interest Income
IsReadOnly	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party income is read only (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
JobTitle	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The job title of the party.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party income.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner associated with the party income. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party associated with the party income. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Applicant, ClaimParticipant, Contact, PartyProfile</p>

Field	Details
PartyProfileId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The party profile associated with an applicant. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date when the party income starts.</p>
UsageType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Internal field. Specifies the application using the party income to populate data. Possible values are: <ul style="list-style-type: none"> • CashFlow—Cash Flow • Claim • VehicleAndAssetLoanOrigination—Vehicle And Asset Loan Origination </p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The timestamp when the verification status is updated.</p>
VerificationStatus	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The verification status of the party income.</p>

ParticipantRole

Represents details such as the name and associated default access level for a role that a participant can have in the context of a parent record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
DefaultAccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The default sharing access granted to the participant role. Valid values are:</p> <ul style="list-style-type: none"> • Edit—Read/Write • None • Read—Read Only
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the participant role is activated (<code>true</code>) or not (<code>false</code>).</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the participant role.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name for the participant role.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace prefix associated with this object.</p>
ParentObject	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The parent object for the participant role.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Account • InteractionSummary—Available in API version 51.0 and later. • Opportunity

PartyIdentityVerification

Represents information about the identity verification checks done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IsResultOverridden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party identity verification result was overridden. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party identity verification record.</p>
OverriddenById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The record of the user who is responsible for overriding the party identity verification result. This field is a relationship field.</p>
	<p>Relationship Name OverriddenBy</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To User</p>
OverriddenResult	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the overridden result for a party after the party identity verification is complete. Possible values are:</p> <ul style="list-style-type: none"> Accepted On Hold Rejected
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The party profile that's associated with the third-party identity verification. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
ReportUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL of the report provided by the third-party identity verification agency.</p>
RequestCompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the party identity verification request was completed.</p>
Result	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the result of the party identity verification. Possible values are: <ul style="list-style-type: none"> Accepted On Hold Rejected </p>
ResultOverrideComment	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description about the party identity verification.</p>

Field	Details
ResultOverrideReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the reason for overriding the party identity verification request. Possible values are:</p> <ul style="list-style-type: none"> • In Person Verification • Manual Verification
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the party identity verification request. Possible values are:</p> <ul style="list-style-type: none"> • Completed • In Progress • Initiated
ThirdPartyVerfProcIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of verification run in the third-party verification system.</p>
ThirdPartyVerfdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the identity verification record in the third-party identity verification system.</p>
ThirdPartyVerificationRunUrl	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The third-party URL to view details of the verification run on the party profile.</p>
VerificationRequestDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the party identity verification request was submitted.</p>
VerifiedBy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the third-party that conducted the identity verification.</p>

Associated Objects

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

[PartyIdentityVerificationChangeEvent on page 956](#)

Change events are available for the object.

[PartyIdentityVerificationFeed on page 960](#)

Feed tracking is available for the object.

[PartyIdentityVerificationHistory on page 968](#)

History is available for tracked fields of the object.

[PartyIdentityVerificationOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyIdentityVerificationShare on page 976](#)

Sharing is available for the object.

PartyIdentityVerificationStep

Represents information about the identity verification done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IdVerificationArtifactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The artifact submitted for identity verification. This field is a relationship field.</p> <p>Relationship Name IdVerificationArtifact</p> <p>Relationship Type Lookup</p> <p>Refers To IdentityDocument</p>
IntegrationProviderExecId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integration provider execution that's associated with the party identity verification step. This field is a relationship field.</p> <p>Relationship Name IntegrationProviderExec</p> <p>Refers To IntegrationProviderExecution</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party profile verification step record.</p>
PartyIdentityVerificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The party identity verification record that's associated with the verification step. This field is a relationship field.</p> <p>Relationship Name PartyIdentityVerification</p> <p>Relationship Type Lookup</p> <p>Refers To PartyIdentityVerification</p>
ReportUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL of the report provided by the third-party identity verification agency.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the third-party identity verification. Possible values are:</p> <ul style="list-style-type: none"> Cancelled Completed

Field	Details
	<ul style="list-style-type: none"> • In Progress • Initiated
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of the third-party identity verification. Possible values are:</p> <ul style="list-style-type: none"> • Document • Facial Biometric • Other Biometric
VerificationDecision	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the decision taken after the third-party identity verification is completed. Possible values are:</p> <ul style="list-style-type: none"> • Accepted • Manual Review Required • Not Accepted

Associated Objects

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

[PartyIdentityVerificationStepChangeEvent on page 956](#)

Change events are available for the object.

[PartyIdentityVerificationStepFeed on page 960](#)

Feed tracking is available for the object.

[PartyIdentityVerificationStepHistory on page 968](#)

History is available for tracked fields of the object.

[PartyIdentityVerificationStepOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyIdentityVerificationStepShare on page 976](#)

Sharing is available for the object.

PartyProfile

Represents information about the profile of a party, such as a contact, account, or lead. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that's associated with the party profile. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
BusLicIssAuthorityName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the business license issuing authority.</p>
BusinessEntityCtryofInc	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the country where the business entity was formed.</p>

Field	Details
BusinessEntityCtryofRgstr	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the country where the business entity is registered.
BusinessEntityIncDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description The incorporation date of the business entity associated with the party profile.
BusinessEntityIncNumber	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The incorporation number of the business entity associated with the party profile.
BusinessEntityName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The registered name of the business entity associated with the party profile.
BusinessEntityPreviousNames	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Any previous names of the business entity associated with the party profile.
BusinessEntityRgstrDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The registration date of the business entity associated with the party profile.

Field	Details
BusinessEntityRgstrNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The registration number of the business entity associated with the party profile.</p>
BusinessEntityTradeName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The trading name of the business entity associated with the party profile.</p>
BusinessEntityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the business entity associated with the party profile. Possible values are:</p> <ul style="list-style-type: none"> Locally Incorporated Company Sole Proprietorship Foreign Company Limited Partnership General Partnership Foundations Trusts
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact that's associated with the party profile. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To
	Contact
CountryOfDomicile	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the country of domicile in the party profile.
CountryofBirth	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the country of birth in the party profile.
CreditScore	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The credit score of the party.
CreditScoreProvider	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the name of the agency that provides the credit score of the party.
CustomerReferenceNumber	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The unique identifier that the bank assigns to the customer associated with the party profile record.
DateOfBirth	Type
	date

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of birth of the party.</p>
EmploymentIndustry	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employment industry of the party specified in the profile.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Banking • Energy and Utilities • Government • Healthcare • IT • Mining • Real Estate
EmploymentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of employment held by the party.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Full Time • Independent Contractor • Part Time • Retired • Student • Temporary • Unemployed
FirstName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The first name of the party in the profile.</p>
FullName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The full name of the party profile.</p>
FundSource	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the source of funds for a party in the profile.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Business Income • Commission • Government Benefits • Rental Income • Salary
Gender	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the gender of the party in the profile.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Decline to Specify • Female • Male
HouseholdAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The household account that's associated with the party profile.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name HouseholdAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Industry	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the industry in which a business entity operates.</p>
IndustryClassificationCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique code associated with the industry in which a business entity operates.</p>
IsBusEntyListonStockExch	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the business entity is listed on a stock exchange (true) or not (false). The default value is <code>false</code>.</p>
IsFlaggedCustomer	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The default value is <code>false</code>.</p>
IsNetWorthHigh	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the customer has a high net worth (true) or not (false). The default value is <code>false</code>.</p>
IsOffBoarded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party profile was off-boarded (true) or not (false). The default value is <code>false</code>.</p>
IsVerified	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the party profile is verified (true) or not (false).</p>
LastName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last name of the party in the profile.</p>
LastProfileReviewDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the party profile was last reviewed.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LeadId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lead that's associated with the party profile. This field is a relationship field.</p> <p>Relationship Name Lead</p> <p>Relationship Type Lookup</p> <p>Refers To Lead</p>
LegalEntityIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the business entity used in all financial transactions.</p>
MiddleName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The middle name of the party in the profile.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	Description
	The name of the party profile record.
Nationality	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The nationalities held by the party profile.
NextProfileReviewDate	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date of the next party profile review.
OffBoardingComments	Type textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date of the next party profile review.
OffBoardingReason	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reason the party profile was off-boarded.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the record owner.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Prefix	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The prefix used by the party.</p>
PrimaryEmail	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary email address of the party that's specified in the profile.</p>
PrimaryIdentificationName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the primary identification document specified in the profile.</p>
PrimaryIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier for the party.</p>
PrimaryIdentifierType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of primary identification document defined in the profile.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Birth Certificate

Field	Details
	<ul style="list-style-type: none"> • Driving License • Government ID • Passport
PrimaryPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary phone number of the party that's specified in the profile.</p>
RelatedPartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile record associated with this record. This field is a relationship field.</p> <p>Relationship Name RelatedPartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
ResidentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of party residency in the profile.</p>
ReviewDecision	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the decision taken after the party profile review is complete. Possible values are:</p> <ul style="list-style-type: none"> • Accepted • On Hold

Field	Details
	<ul style="list-style-type: none"> Rejected
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current stage of the party profile.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Initiated Risk Screening Document Validation Risk Assessment Approval Approved Rejected On Hold
StockExchangeName	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the name of the stock exchange where the business entity is listed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> New York Stock Exchange NASDAQ London Stock Exchange Tokyo Stock Exchange
Suffix	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The suffix used by the party.</p>
SurnameAtBirth	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party surname at birth specified in the profile.</p>
TaxpayerIdentificationNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The taxpayer identifier that's used for tax purposes.</p>
TaxpayerIdentificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of taxpayer identification used for tax purposes. Possible values are:<ul style="list-style-type: none">• SSN• Taxpayer Identification Number</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the party profile associated with the applicant. Possible values are:<ul style="list-style-type: none">• Business• Individual</p>
RetirementFundAccountNumber	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The retirement fund account number of the party profile</p>

Associated Objects

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

[PartyProfileChangeEvent on page 956](#)

Change events are available for the object.

[PartyProfileFeed on page 960](#)

Feed tracking is available for the object.

[PartyProfileHistory on page 968](#)

History is available for tracked fields of the object.

[PartyProfileOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyProfileShare on page 976](#)

Sharing is available for the object.

PartyProfileAddress

Represents information about the address of the party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
Address	<p>Type address</p> <p>Properties Filter, Nullable</p> <p>Description The full address.</p>
AddressType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the type of party address.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Billing

Field	Details
	<ul style="list-style-type: none"> • Shipping • Temporary
City	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city detail for the address. For example, this field is known as MailingCity on Contact.</p>
Country	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country detail for the address. For example, this field is known as MailingCountry on Contact.</p>
GeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
IsPrimaryAddress	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the party's address is the primary address. The default value is <code>false</code>.</p>
IsCurrentAddress	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party profile address is the current address (true) or not (false). The default value is <code>false</code>.</p>
IsNegativeAddress	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The default value is <code>false</code>.</p>
IsPermanentAddress	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the address of the party profile is a permanent address (true) or not (false). The default value is <code>false</code>.</p>
IsVerified	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the party profile address verification. Possible values are:</p> <ul style="list-style-type: none"> • In Progress • Not Verified • Verification Unsuccessful • Verified

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Latitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address. For example, this field is known as MailingLatitude on Contact.</p>
Longitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Latitude to specify the precise geolocation of the address. For example, this field is known as MailingLongitude on Contact.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party profile address record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile that's associated with the address. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
PostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code for the address. For example, this field is known as MailingPostalCode on Contact.</p>
State	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state detail for the address. For example, this field is known as MailingState on Contact.</p>
Street	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street detail for the address. For example, this field is known as MailingStreet on Contact.</p>
ValidityEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party profile address becomes valid.</p>
ValidityStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until when the party profile address is valid.</p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the party profile address was verified.</p>

Associated Objects

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

[PartyProfileAddressChangeEvent on page 956](#)

Change events are available for the object.

[PartyProfileAddressFeed on page 960](#)

Feed tracking is available for the object.

[PartyProfileAddressHistory on page 968](#)

History is available for tracked fields of the object.

[PartyProfileAddressOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyProfileAddressShare on page 976](#)

Sharing is available for the object.

PartyProfileParticipant

Represents information about the profile participant of a party. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The additional information about the participant.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party profile participant is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party profile participant record.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The participant associated with the party profile. This field is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The default access level for a role that a participant can have in the context of a parent record. This field is a relationship field.</p> <p>Relationship Name ParticipantRole</p> <p>Relationship Type Lookup</p> <p>Refers To ParticipantRole</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The party profile associated with the participant.</p>

Field	Details
	This field is a relationship field.
Relationship Name	
	PartyProfile
Relationship Type	
	Master-detail
Refers To	
	PartyProfile (the master object)

Associated Objects

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

[PartyProfileParticipantChangeEvent on page 956](#)

Change events are available for the object.

[PartyProfileParticipantFeed on page 960](#)

Feed tracking is available for the object.

[PartyProfileParticipantHistory on page 968](#)

History is available for tracked fields of the object.

PartyProfileRisk

Represents information about the risk assessment done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
<code>IsRiskOverridden</code>	
	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the risk assessment result of the party was overridden.
	The default value is <code>false</code> .

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party profile risk record.</p>
OverriddenRiskCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the risk category that's overridden for a party after the assessment is complete. Possible values are: <ul style="list-style-type: none"> • High • Low • Medium </p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The party profile that's associated with the risk assessment. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p> <p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
RiskCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the risk category that's assigned to a party profile after the assessment is complete. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Medium
RiskOverriddenById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The user who overrode the risk assessment result of the party. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RiskOverriddenBy</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
RiskOverrideReason	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The reason for overriding the risk assessment result.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of risk assessment. Possible values are:</p> <ul style="list-style-type: none"> • Final • Initial

Associated Objects

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

[PartyProfileRiskChangeEvent on page 956](#)

Change events are available for the object.

[PartyProfileRiskFeed on page 960](#)

Feed tracking is available for the object.

[PartyProfileRiskHistory on page 968](#)

History is available for tracked fields of the object.

[PartyProfileRiskOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyProfileRiskShare on page 976](#)

Sharing is available for the object.

PartyScreeningStep

Represents information about the screening process conducted for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
DisclaimerText	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The disclaimer text received for the party profile screening.</p>
IntegrationProviderExecId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integration provider execution that's associated with the party screening step. This field is a relationship field.</p> <p>Relationship Name IntegrationProviderExec</p> <p>Refers To IntegrationProviderExecution</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MatchedFieldList	<p>Type multipicklist</p>
	<p>Properties Create, Filter, Nillable, Update</p>
	<p>Description Specifies the fields that matched during the party profile screening.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Address • First Name • ID • Last Name
Name	<p>Type string</p>
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p>
	<p>Description The name of the party screening step record.</p>
ResponseCodeComment	<p>Type textarea</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description The description of the response code.</p>
ResultCode	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The code received after the party profile screening is completed.</p>
ScreeningSummaryId	<p>Type reference</p>
	<p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The party screening summary record associated with this screening step. This field is a relationship field.</p>
	<p>Relationship Name ScreeningSummary</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To PartyScreeningSummary</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the third-party party profile screening. Possible values are:</p> <ul style="list-style-type: none"> Cancelled Completed In Progress Initiated
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of the third-party party profile screening. Possible values are:</p> <ul style="list-style-type: none"> Adverse Media Global Sanctions OFAC PEP

Associated Objects

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

PartyScreeningStepChangeEvent on page 956

Change events are available for the object.

PartyScreeningStepFeed on page 960

Feed tracking is available for the object.

PartyScreeningStepHistory on page 968

History is available for tracked fields of the object.

PartyScreeningStepOwnerSharingRule on page 973

Sharing rules are available for the object.

PartyScreeningStepShare on page 976

Sharing is available for the object.

PartyScreeningSummary

Represents information about the individual screening done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ApplicantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The applicant that's associated with the party screening summary. This field is a relationship field.</p> <p>Relationship Name Applicant</p> <p>Refers To Applicant</p>
IsResultOverridden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the party profile screening result was overridden.</p>

Field	Details
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the party screening summary record.</p>
OverriddenById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user who is responsible for overriding the party profile screening result. This field is a relationship field.</p> <p>Relationship Name OverriddenBy</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
OverriddenScreeningDecision	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the overridden result for a party after the screening is complete. Possible values are:</p> <ul style="list-style-type: none"> • Clear • On Hold • Rejected
OverrideDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the party profile screening was overridden.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The party profile that's associated with the third-party profile screening. This field is a relationship field.</p> <p>Relationship Name PartyProfile</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To PartyProfile</p>
ReportUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL of the report provided by the third-party profile screening agency.</p>
RequestCompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the party profile screening request was completed.</p>
ResultOverrideComment	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description about the party profile screening.</p>
ResultOverrideReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the reason for overriding the party profile screening request. Possible values are: <ul style="list-style-type: none"> Manual Verification </p>
ScreenedBy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the third-party that conducted the profile screening.</p>

Field	Details
ScreeningDecision	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the result of the party profile screening. Possible values are:</p> <ul style="list-style-type: none"> • Clear • On Hold • Rejected
ScreeningRequestDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the screening request for the party profile was submitted.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the party profile screening request. Possible values are:</p> <ul style="list-style-type: none"> • Completed • In Progress • Initiated
ThirdPartyScreeningResult	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The raw JSON or XML payload from the third-party screening system.</p>
ThirdPartyScreeningIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	The ID of the profile screening record in the third-party profile screening system.

Associated Objects

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

[PartyScreeningSummaryChangeEvent on page 956](#)

Change events are available for the object.

[PartyScreeningSummaryFeed on page 960](#)

Feed tracking is available for the object.

[PartyScreeningSummaryHistory on page 968](#)

History is available for tracked fields of the object.

[PartyScreeningSummaryOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[PartyScreeningSummaryShare on page 976](#)

Sharing is available for the object.

PaymentMandate

Represents information about the payment mandates given by a customer to their bank or financial institution to authorize a third party to collect payments from their account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AuthorizationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The type of authorization associated with the mandate. For example, whether the authorization is for the payment or disbursement requested in the mandate.</p>
BankAccountNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account number of the bank that's used for the payment or disbursement.</p>
BankAccountType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of bank account.</p>
BankRoutingNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sort code or routing number of the bank that's used for payment or disbursement.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is USD. The default value is USD.</p>
DisbursementAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address where the disbursement check is sent.</p>

Field	Details
DisbursementCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city related to the disbursement address.</p>
DisbursementCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country related to the disbursement address.</p>
DisbursementGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the milestone location's latitude and longitude coordinates.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
DisbursementLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The latitude related to the disbursement address.
DisbursementLongitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The longitude related to the disbursement address.
DisbursementPostalCode	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code related to the disbursement address.
DisbursementState	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The state related to the disbursement address.
DisbursementStreet	Type textArea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The street related to the disbursement address.
FinancialAccountId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The financial account associated with the payment mandate.
	This field is a relationship field.
	Relationship Name
	FinancialAccount

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
IsAccountValidated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account is validated (true) or not (false). The default value is false.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the mandate is active (true) or not (false). The default value is false.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record.</p>
MandateAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount of the payment or disbursement requested in the mandate.</p>

Field	Details
MandateEffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the mandate.</p>
MandateEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the mandate.</p>
MandateExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external registration identifier of the mandate.</p>
MandateFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payment frequency for the mandate.</p>
MandateInternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique ID of the mandate.</p>
MandateStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the mandate.</p>

Field	Details
MandateSubmissionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the mandate was submitted.</p>
MandateType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of mandate.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the payment mandate.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the payment mandate record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PersonAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person account that's associated with the mandate.</p>

Field	Details
	This field is a relationship field.
Relationship Name	PersonAccount
Relationship Type	Lookup
Refers To	Account
Ratio	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The disbursement or payment percentage across bank accounts.</p>

Associated Objects

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

[paymentmandateChangeEvent on page 956](#)

Change events are available for the object.

[paymentmandateFeed on page 960](#)

Feed tracking is available for the object.

[paymentmandateHistory on page 968](#)

History is available for tracked fields of the object.

[paymentmandateShare on page 976](#)

Sharing is available for the object.

PaymentRequest

Represents a financial compensation request for goods or services provided by a third party. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
ClaimId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim associated with the payment request. This is a relationship field.</p> <p>Relationship Name Claim</p> <p>Relationship Type Lookup</p> <p>Refers To Claim</p>
DueDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The due date of the payment request.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date of services represented in the payment request.</p>
FacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The facility associated with the payment request. This is a polymorphic relationship field.</p> <p>Relationship Name Facility</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Account, Location</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy associated with the payment request. This is a relationship field.</p> <p>Relationship Name InsurancePolicy</p> <p>Relationship Type Lookup</p> <p>Refers To InsurancePolicy</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Payment Request.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ReceivedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the recipient received the payment request.</p>
ReceivedMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The method in which the payment request was received. Possible values include: <ul style="list-style-type: none"> • Electronic Submission • Paper Mail </p>
ReferenceNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description External unique identifier from the submitting party, such as an invoice number.</p>
RemittanceAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The account that receives the remittance payment for the services. This is a polymorphic relationship field.</p> <p>Relationship Name RemittanceAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account, InsurancePolicyParticipant</p>
ServiceProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The service provider associated with the payment request. This is a polymorphic relationship field.</p> <p>Relationship Name ServiceProvider</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>
ServiceRecipientId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account that receives the services in the payment request. This is a polymorphic relationship field.</p> <p>Relationship Name ServiceRecipient</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, InsurancePolicyParticipant</p>
StartTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date of services represented in the payment request.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the payment request.</p> <p>Possible values include:</p> <ul style="list-style-type: none"> • Paid • Received
SubmissionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of payment request submission, such as an invoice from a service provider.</p> <p>Possible values include:</p> <ul style="list-style-type: none"> • Invoice • Online Submission
SubmittedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the service provider submitted the payment request.</p>
SubmittingAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The billing account that submits the payment to the service recipient.</p> <p>This is a relationship field.</p>

Field	Details
	<p>Relationship Name SubmittingAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
TotalAdjustmentAmount	<p>Type currency</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Total amount that is adjusted, such as the collection of a copay onsite. This is a calculated field.</p>
TotalRequestedAmount	<p>Type currency</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Total amount requested for reimbursement. This is a calculated field.</p>
TotalServiceAmount	<p>Type currency</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Total amount of the services, such as the total services billed. This is a calculated field.</p>

Usage

Use this object to process inbound requests for payments, such as an inbound invoice submitted to an insurance carrier.

Associated Objects

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

[PaymentRequestChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

PaymentRequestFeed on page 960

Feed tracking is available for the object.

PaymentRequestHistory on page 968

History is available for tracked fields of the object.

PaymentRequestOwnerSharingRule on page 973

Sharing rules are available for the object.

PaymentRequestShare on page 976

Sharing is available for the object.

PaymentRequestLine

Represents the line item details of the financial compensation request. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
AdjustmentAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Adjustment amount for reasons such as copay, deductible, and coinsurance.
AdjustmentReason	Type multipicklist Properties Create, Filter, Nillable, Update Description The reason for adjustment. Possible values include: <ul style="list-style-type: none">• Coinsurance• Copay

Field	Details
	<ul style="list-style-type: none"> Deductible
BenefitName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of benefit associated with the payment request line, such as Physical Therapy or Ambulance Transportation.</p>
ClaimItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The claim item associated with the payment request line. This is a relationship field.</p> <p>Relationship Name ClaimItem</p> <p>Relationship Type Lookup</p> <p>Refers To ClaimItem</p>
DiagnosticCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The diagnostic code associated with the payment request line. This is a polymorphic relationship field.</p> <p>Relationship Name DiagnosticCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet, CodeSetBundle</p>
EndDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date of services represented in the payment request line.</p>
FacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The facility associated with the payment request line. This is a polymorphic relationship field.</p> <p>Relationship Name Facility</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Location</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Payment Request Line.</p>

Field	Details
PaymentRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The payment request associated with the payment request line. This is a relationship field.</p> <p>Relationship Name PaymentRequest</p> <p>Relationship Type Lookup</p> <p>Refers To PaymentRequest</p>
Quantity	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number of units the payment request line represents, such as number of days in hospital.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Unit of measure for the quantity field. Possible values include: <ul style="list-style-type: none"> Days Nights Visits </p>
RequestedAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount that the requestor is seeking for payment, which is the service amount minus the adjustment amount.</p>

Field	Details
ServiceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total service amount for the payment request line before adjustments.</p>
ServiceCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service code associated with the payment request line. This is a polymorphic relationship field.</p> <p>Relationship Name ServiceCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet, CodeSetBundle</p>
ServiceProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service provider associated with the payment request line. This is a polymorphic relationship field.</p> <p>Relationship Name ServiceProvider</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>
ServiceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of requested service.</p>

Field	Details
	<p>Possible values include:</p> <ul style="list-style-type: none"> • Device • Medication • Procedure • Repairs
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date of services represented in the payment request line.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the payment request line.</p> <p>Possible values include:</p> <ul style="list-style-type: none"> • Paid • Partially Paid • Received
UnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Unit Price for the quantity and quantity unit of measure.</p>

Associated Objects

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

[PaymentRequestLineChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[PaymentRequestLineFeed on page 960](#)

Feed tracking is available for the object.

PaymentRequestLineHistory on page 968

History is available for tracked fields of the object.

PersonEducation

Represents information about professional education for a person in a party role.

Supported Calls

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

Fields

Field	Details
CompletionDate	Type dateTime Properties Create, Filter, Nullable, Sort, Update Description Education's completion date.
ContactId	Type reference Properties Create, Filter, Group, Nullable, Sort, Update Description ID of the person who earned the degree and is listed as a contact.
EducationLevel	Type picklist Properties Create, Filter, Group, Nullable, Sort, Update Description Level of education achieved. Example values: <ul style="list-style-type: none">Undergraduate degreeMedical schoolInternshipResidencyFellowship

Field	Details
GraduationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Graduation date from institution.</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID issued to the recipient by the educational institution.</p>
IdentifierIssuer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Educational institution's name.</p>
IndividualId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who earned the degree and is listed as an individual.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the degree earned.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Education's start date.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status of education. Valid values:</p> <ul style="list-style-type: none"> • Inactive • Revoked • Draft • Verified <p>The default value is Inactive.</p>

Field	Details
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who earned the degree and is listed as a user.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current educational status. Valid values: <ul style="list-style-type: none"> • Authorized • None The default value is None. </p>
VerifiedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Education was validated on this date.</p>

Associated Objects

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

PersonEducationFeed

Feed tracking is available for the object.

PersonEducationHistory

History is available for tracked fields of the object.

PersonEducationOwnerSharingRule

Sharing rules are available for the object.

PersonEducationShare

Sharing is available for the object.

PersonEmployment

Represents information about a person's employment. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Account associated with the Person Employment.</p> <p>This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
AnnualIncome	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The annual income of the person.</p>
EmployerAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The complete address of the employer.</p>
EmployerCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city where the employer is located.</p>

Field	Details
EmployerCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country where the employer is located.</p>
EmployerGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
EmployerLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
EmployerLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
EmployerPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Employer's phone number.</p>
EmployerPostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code of the employer's address.</p>
EmployerState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state of the employer's address.</p>
EmployerStreet	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street address of the employer.</p>
EmployerTaxAccountNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Tax Deduction and Collection Account Number (TAN) of the employer. Available in API version 61.0 and later with Financial Services Cloud.</p>
EmploymentIndustry	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employment industry.</p>
EmploymentSite	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the site of employment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Hybrid • Onsite—On-site • Remote
EmploymentStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employment status with the employer.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Home Maker • Employed • Retired • Self-Employed • Student • Unemployed • Unemployed with Income • Unemployed without Income
EmploymentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employment type for the party.</p> <p>Possible values are:</p>

Field	Details
	<p>API version 61.0 and later with Financial Services Cloud:</p> <ul style="list-style-type: none"> • Contract • Full-Time • Part-Time • Salaried • Self-Employed • Temporary
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last date of employment at this job.</p>
HourlyWage	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The hourly wage for the party.</p> <p>Available in API version 61.0 and later with Financial Services Cloud.</p>
IsCurrentEmployment	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person employment added is the current employer of the customer.</p> <p>Available in API version 61.0 and later with Financial Services Cloud.</p> <p>The default value is <code>false</code>.</p>
IsFlagged	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the employment-related information requires additional scrutiny.</p> <p>Available in API version 61.0 and later with Financial Services Cloud.</p> <p>The default value is <code>false</code>.</p>

Field	Details
IsLocked	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is locked (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
MayEdit	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the record can be edited (true) or not (false). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name for this record.</p>

Field	Details
Occupation	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the person's occupation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Actor or Entertainer • Architect or Urban Planner • Architecture and Engineering • Artist • Arts, Design, Entertainment, Sports, and Media • Business (Clerical) • Business Executive (Management, Administrator) • Business Owner or Proprietor • Business Salesperson or Buyer • Building and Grounds Cleaning/Maintenance • Clergy (Minister, Priest) • Clergy (Other Religious) • Clinical Psychologist • College Administrator or Staff • College Teacher • Community and Social Service • Computer Programmer or Analyst • Computer and Mathematical • Conservationist or Forester • Construction and Extraction • Dentist (Including Orthodontist) • Dietitian or Nutritionist • Education, Training, and Library • Engineer • Farmer or Rancher • Farming, Fishing, and Forestry • Food Preparation and Serving • Foreign Service Worker (Including Diplomat) • Healthcare Practitioners and Technical • Healthcare Support • Homemaker (Full-Time)

Field	Details
	<ul style="list-style-type: none"> • Interior Decorator (Including Designer) • Installation, Maintenance, and Repair • Lab Technician or Hygienist • Laborer • Law Enforcement Officer • Lawyer (Attorney) or Judge • Legal • Life, Physical, and Social Science • Management • Military Service (Career) • Musician (Performer, Composer) • Nurse • Office Admin • Optometrist • Other • Personal Care and Service • Pharmacist • Physician • Policymaker or Government • Protective Service • Production • Sales • School Counselor • School Principal or Superintendent • Scientific Researcher • Skilled Trades • Social, Welfare, or Recreation Worker • Teacher or Administrator (Elementary) • Teacher or Administrator (Secondary) • Therapist (Physical, Occupational, Speech) • Transportation and Material Moving • Veterinarian • Writer or Journalist
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The user who owns this record. This field is a polymorphic relationship field.</p>
	<p>Relationship Name Owner</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Group, User</p>
Position	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last position of the person at this job.</p>
RelatedPersonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The person associated with the employment. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedPerson</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of employment at this job.</p>
VerificationDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the person employment was verified. Available in API version 61.0 and later with Financial Services Cloud.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the employment verification done for the party profile. Available in API version 61.0 and later with Financial Services Cloud.</p>
WeeklyHourCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of hours per week that the party works for the employer. Available in API version 61.0 and later with Financial Services Cloud.</p>
WorkerType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the worker type for the party that's employed. Possible values are: <ul style="list-style-type: none"> • Hourly • Salaried </p>

For more information, see [PersonEmployment in Public Sector Solutions](#).

PersonLifeEvent

Represents the life events of an individual, such as marriage, birth of a child, birthday, engagement.

Supported Calls

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

Fields

Field	Details
EventDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date on which the life event occurred.</p>
EventDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the life event.</p>
EventLocation	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the life event occurred.</p> <p>This is a compound field of type Address and combines these fields: EventLocationCity, EventLocationCountry, EventLocationGeocodeAccuracy, EventLocationLatitude, EventLocationLongitude, EventLocationPostalCode, EventLocationState, and EventLocationStreet. For more information, see Address Compound Fields.</p>
EventType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The type of the life event. For example, birth, graduation, job, marriage, relocation, car, home, baby, retirement.</p>
ExpirationDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The the date when a life event expired.</p>
ExpirationDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Describes why the event expired.</p>
IsExpired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a life event has expired. The default value is False.</p>
IsTentative	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the exact date of the event is not known. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the life event.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
PrimaryPersonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the person to whom the life event is related. This field cannot be updated using API.</p>
RelatedPersonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person related to the primary person in a life event involving two people, such as marriage.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of this record in the source system.</p>

Associated Objects

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

[PersonLifeEventChangeEvent on page 956](#)

Change events are available for the object.

[PersonLifeEventFeed](#)

Feed tracking is available for the object.

[PersonLifeEventHistory](#)

History is available for tracked fields of the object.

[PersonLifeEventOwnerSharingRule](#)

Sharing rules are available for the object.

[PersonLifeEventShare](#)

Sharing is available for the object.

Producer

Represents an agent or an agency selling insurance.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the agency's business account.</p>
ContactId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the contact associated with the producer if the producer is an external agent.</p>
InternalUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description If the producer is an internal employee, this field contains the employee's user ID.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A unique identifier for the agent or the agency.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner.</p>

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the producer is an agent or an agency. If the producer reference has agency information, this field value is Agent. Otherwise, it can be an independent agent or agency.</p>

Associated Objects

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

[ProducerChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerFeed](#)

Feed tracking is available for the object.

[ProducerHistory](#)

History is available for tracked fields of the object.

[ProducerOwnerSharingRule](#)

Sharing rules are available for the object.

[ProducerShare](#)

Sharing is available for the object.

ProducerCommission

Represents a producer's commission for an insurance policy. The commission can be calculated from the commissionable transactions or can be populated from an external system. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
CommissionAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The calculated commission amount for the insurance policy transaction.
CommissionStatementLineItemId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The Commission Statement Line Item corresponds to the Producer Commission
	This field is a relationship field.
	Relationship Name
	CommissionStatementLineItem
	Refers To
	CommissionStatementLineItem
CommissionableAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount on which the commission is applied. This can be a transaction amount or a portion of the premium.
CurrencyIsoCode	Type
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.
	Possible values are:
	<ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar
	The default value is USD.
InsurancePolicyAssetId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The insured item for which the commission was calculated.</p>
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the policy coverage for which the commission was calculated.</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy for which the commission was calculated.</p>
InsurancePolicyTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction for which the commission record was created.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the producer commission.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
PaymentDatetime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the commission was paid.</p>
ProducerAllocationAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The revenue amount to be received by the producer associated with the producer commission of Book of Business type.</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The producer, broker, brokerage, or other user who receives the commission.</p>
ProducerSplitArrngLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Producer Split Arrangement Line Item corresponds to the Producer Commission This field is a relationship field.</p>

Field	Details
	<p>Relationship Name ProducerSplitArngLineItem</p> <p>Refers To ProducerSplitArngLineItem</p>
ProducerSplitAssignmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The Producer Split Assignment corresponds to the Producer Commission This field is a relationship field.</p> <p>Relationship Name ProducerSplitAssignment</p> <p>Refers To ProducerSplitAssignment</p>
ProducerSplitRoleAssignmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Related Producer Split Role Assignment This field is a relationship field.</p> <p>Relationship Name ProducerSplitRoleAssignment</p> <p>Refers To ProducerSplitRoleAssignment</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system from which the producer commission record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p>

Field	Details
	<p>Description The ID of the producer commission record in the source system. This field is unique within your organization.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the commission payment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Disputed • Paid • Pending • Reversed
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of commission paid to a producer, account, or contact for a commissionable transaction.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Advance • Bonus • Chargeback • Commission • Contingent Commission

Associated Objects

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

[ProducerCommissionChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerCommissionFeed on page 960](#)

Feed tracking is available for the object.

[ProducerCommissionHistory on page 968](#)

History is available for tracked fields of the object.

ProducerCommissionOwnerSharingRule on page 973

Sharing rules are available for the object.

ProducerCommissionShare on page 976

Sharing is available for the object.

ProducerPolicyAssignment

A junction object that associates the Insurance Policy object with the Producer object. This object represents the producers who are managing the same insurance policy. This object is available in API version 47.0 and later. You see this object only if you have enabled the Let Multiple Producers Work on the Same Policy org pref.

Supported Calls

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

Fields

Field	Details
InsurancePolicyId	Type reference Properties Create, Filter, Group, Sort, Update Description The insurance policy that the producer is managing.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort 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
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The producer's line of business. Possible values are:</p> <ul style="list-style-type: none"> • Business Liability • Commercial Auto • Commercial Property
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of one of the producers who are working on the insurance policy.</p>

Associated Objects

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

[ProducerPolicyAssignmentChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerPolicyAssignmentFeed](#)

Feed tracking is available for the object.

ProducerPolicyAssignmentHistory

History is available for tracked fields of the object.

ProducerPolicyAssignmentOwnerSharingRule

Sharing rules are available for the object.

ProducerPolicyAssignmentShare

Sharing is available for the object.

ProducerRelationship

Represents the relationship between producer team and associated producers. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from when the relationship becomes effective.</p>
EndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until when the relationship remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the producer relationship record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The primary producer of the team. This field is a relationship field.</p> <p>Relationship Name Producer</p> <p>Relationship Type Master-detail</p> <p>Refers To Producer (the master object)</p>
RelatedProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The producer that's associated with the primary producer of the team. This field is a relationship field.</p> <p>Relationship Name RelatedProducer</p> <p>Refers To Producer</p>
RelatedProducerRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the role of the producer that's associated with the primary producer of the team.</p>
ShouldReceiveRoundedAmount	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the producer receives a rounded value from the split amount. The default value is <code>false</code>.</p>

Field	Details
SplitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that the producer gets paid for the split.</p>
SplitPercent	<p>Type percent</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The percentage of split to be earned as commission by each producer in the team.</p>

Associated Objects

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

[ProducerRelationshipChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerRelationshipHistory on page 968](#)

History is available for tracked fields of the object.

[ProducerRelationshipOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ProducerRelationshipShare on page 976](#)

Sharing is available for the object.

ProducerSplitArngLineItem

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

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar <p>The default value is USD.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the producer split arrangement line item record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The producer associated with the line item. This field is a relationship field.</p> <p>Relationship Name Producer</p> <p>Refers To Producer</p>
ProducerRelationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the relationship of producer with the brokerage. Possible values are: <ul style="list-style-type: none"> External Internal </p>
ProducerRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The role of the producer associated with the line item. Possible values are: <ul style="list-style-type: none"> Primary Producer </p>

Field	Details
	<ul style="list-style-type: none"> Secondary Producer Tertiary Producer
ProducerSplitArrangementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent producer split arrangement associated with the line item. This field is a relationship field.</p> <p>Relationship Name ProducerSplitArrangement</p> <p>Relationship Type Master-detail</p> <p>Refers To ProducerSplitArrangement (the master object)</p>
ShouldReceiveRoundedAmount	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the producer receives a rounded value from the split amount. The default value is <code>false</code>.</p>
SplitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that the producer gets paid for the split.</p>
SplitPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The commission percentage associated with the split.</p>
SplitType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>
	<p>Description The type of split. Possible values are:</p> <ul style="list-style-type: none"> • Bonus • Book of Business • Commission • Override • Revenue Allocation
SseqProducerSplitArngId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subsequent producer split arrangement associated with the line item. This field is a relationship field.</p> <p>Relationship Name SseqProducerSplitArng</p> <p>Refers To ProducerSplitArrangement</p>

Associated Objects

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

[ProducerSplitArngLineItemChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerSplitArngLineItemHistory on page 968](#)

History is available for tracked fields of the object.

[ProducerSplitArngLineItemOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ProducerSplitArngLineItemShare on page 976](#)

Sharing is available for the object.

ProducerSplitArrangement

Represents a Producer Split Arrangement definition associated with an account, service, or an item. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
AssignableEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until which the producer split arrangement can be assigned.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:<ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar The default value is USD.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from which the brokerage split is effective.</p>
EndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the brokerage split.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The line of business associated with the producer split arrangement. Possible values are: <ul style="list-style-type: none"> Employee Benefits Property & Casualty </p>
LineOfCoverage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The line of coverage associated with the producer split arrangement.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of the producer split arrangement record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SplitArrangementType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of split arrangement.</p>

Associated Objects

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

[ProducerSplitArrangementChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerSplitArrangementHistory on page 968](#)

History is available for tracked fields of the object.

[ProducerSplitArrangementOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ProducerSplitArrangementShare on page 976](#)

Sharing is available for the object.

ProducerSplitAssignment

Represents information about commission split associated with a producer that's used to process commission statement. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> EUR—Euro GBP—British Pound USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date when the producer split assignment becomes effective.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the producer split assignment.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the producer split assignment record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProducerSplitArrangementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The brokerage split object that's related to the Brokerage Split Assignment. This field is a relationship field.</p> <p>Relationship Name ProducerSplitArrangement</p> <p>Refers To ProducerSplitArrangement</p>
ReferenceRecordId	<p>Type reference</p>

Field	Details
Properties	Create, Filter, Group, Sort, Update
Description	The reference record to which the producer split arrangement is assigned. This field is a polymorphic relationship field.
Relationship Name	ReferenceRecord
Refers To	Account, InsurancePolicy

Associated Objects

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

[ProducerSplitAssignmentChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerSplitAssignmentHistory on page 968](#)

History is available for tracked fields of the object.

[ProducerSplitAssignmentOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ProducerSplitAssignmentShare on page 976](#)

Sharing is available for the object.

ProducerSplitRoleAssignment

Represents the revenue generating entities associated with an insurance policy and account. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	Type picklist

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are:</p> <ul style="list-style-type: none"> • EUR—Euro • GBP—British Pound • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from when the assignment of the producer role becomes effective.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until when the assignment of the producer role remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The line of business associated with the producer split role assignment. Possible values are:</p> <ul style="list-style-type: none"> • Employee Benefits • Property & Casualty
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the producer split role assignment record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProducerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The producer associated with the assigned role. This field is a relationship field.</p> <p>Relationship Name Producer</p> <p>Refers To Producer</p>

Field	Details
ProducerRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The role of producer in the assignment. Possible values are:</p> <ul style="list-style-type: none"> • Primary Producer • Secondary Producer • Tertiary Producer
ReferenceRecordID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The reference record associated with the assigned producer role. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Refers To Account, InsurancePolicy</p>

Associated Objects

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

[ProducerSplitRoleAssignmentChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[ProducerSplitRoleAssignmentHistory on page 968](#)

History is available for tracked fields of the object.

[ProducerSplitRoleAssignmentOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[ProducerSplitRoleAssignmentShare on page 976](#)

Sharing is available for the object.

ProductCoverage

A junction object that associates the Product object with the CoverageType object. You see this object only if you have enabled the Access Master List of Coverage Types org pref.

Supported Calls

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

Fields

Field	Details
CoverageTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the coverage type.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from which the coverage is in effect.</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the coverage expires.</p>
IsCovered	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this coverage is included in the product. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

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

Field	Details
Description	The ID of this record in the source system.

Associated Objects

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

[ProductCoverageChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

[ProductCoverageFeed](#)

Feed tracking is available for the object.

[ProductCoverageHistory](#)

History is available for tracked fields of the object.

[ProductCoverageOwnerSharingRule](#)

Sharing rules are available for the object.

[ProductCoverageShare](#)

Sharing is available for the object.

ProductFee

Represents the base fee associated with a product. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount of the fee.</p>
Frequency	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of the fee. Valid values are:<ul style="list-style-type: none">• Monthly• One Time</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product fee.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product fee record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated to the fee. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of fee. Valid values are: <ul style="list-style-type: none"> • Closing Fee • Origination Fee </p>
ValidEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the fee.</p>
ValidStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the fee.</p>

Associated Objects

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

[productfeeChangeEvent on page 956](#)

Change events are available for the object.

[ProductFeeFeed on page 960](#)

Feed tracking is available for the object.

[ProductFeeHistory on page 968](#)

History is available for tracked fields of the object.

[ProductFeeShare on page 976](#)

Sharing is available for the object.

ProductListRate

Represents the list rate of the product. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record.</p>
ListRate	<p>Type percent</p>

Field	Details
	<p>Properties Create, Filter, Sort, Update</p> <p>Description The representative list rate of the loan product</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product list rate.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product list rate record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product to which the list rate is associated. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
ValidEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The start date of the rate.</p>
ValidStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The end date of the rate.</p>

Associated Objects

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

[productlistrateChangeEvent on page 956](#)

Change events are available for the object.

[ProductListRateFeed on page 960](#)

Feed tracking is available for the object.

[ProductListRateHistory on page 968](#)

History is available for tracked fields of the object.

[ProductListRateShare on page 976](#)

Sharing is available for the object.

ProductSurcharge

Represents an association between a product and a surcharge. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the product surcharge becomes active.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the product surcharge becomes inactive.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product surcharge is active (true) or not (false). The default value is <code>false</code>.</p>
IsProrationAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product surcharge is eligible for proration (true) or not (false). The default value is <code>false</code>.</p>
IsRefundAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product surcharge is eligible for a refund (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product surcharge.</p>
ProductPath	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A path containing the product IDs that roll up to the parent product.</p>
ProductRelatedComponentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product related component associated with the product surcharge. This field is a relationship field.</p> <p>Relationship Name ProductRelatedComponent</p> <p>Refers To ProductRelatedComponent</p>

Field	Details
RuleApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the rule that's used to trigger the surcharge.</p>
SurchargeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The surcharge associated with the product surcharge. This field is a relationship field.</p> <p>Relationship Name Surcharge</p> <p>Relationship Type Master-detail</p> <p>Refers To Surcharge (the master object)</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The tax treatment associated with the product surcharge. This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>

Associated Objects

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

[ProductSurchargeHistory on page 968](#)

History is available for tracked fields of the object in API version 64.0 and later.

QuoteLineItemGroupClass

Represents the association of a Quote Line Item to GroupClass. Use this entity for large group quoting process when multiple group classes are attributed on a single quote line item. Child object of Quote. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
GroupClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The group class associated with the quote and quote line item. This is a relationship field.</p> <p>Relationship Name GroupClass</p> <p>Relationship Type Lookup</p> <p>Refers To GroupClass</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the quote line item group class.</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The quote line item associated with the quote line item group class. This is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Lookup</p> <p>Refers To QuoteLineItem</p>

Associated Objects

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

[QuoteLineItemGroupClassChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[QuoteLineItemGroupClassFeed on page 960](#)

Feed tracking is available for the object.

[QuoteLineItemGroupClassHistory on page 968](#)

History is available for tracked fields of the object.

QuoteLineItemRelatedObject

Represents the junction between a Quote Line Item and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on the Quote Line Item. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the quote line item related object record.</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The quote line item associated with the record of the related object. This field is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To QuoteLineItem (the master object)</p>
RelatedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the record that's used to get the details of the quote line item.</p>
RelatedRecordObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The name of the object associated with the related record.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The name of the object associated with the related record. Possible values are:<ul style="list-style-type: none"> • ExtendedAttribute </p>

Associated Objects

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

[QuoteLineItemRelatedObjectChangeEvent on page 956](#)

Change events are available for the object.

[QuoteLineItemRelatedObjectHistory on page 968](#)

History is available for tracked fields of the object.

RelatedRecordAssocCriteria

Defines criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them. This object is available in API version 52.0 and later.

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

Supported Calls

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

Special Access Rules

To use this object, you must have the Financial Services Cloud Extension permission set.

Fields

Field	Details
AssociationHandlerApexClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of a custom Apex class that handles the creation of association records for specific association criteria. (Typically in the user interface you see the class name.) This class must:</p> <ul style="list-style-type: none"> • Apply to an object that the Record Association Builder doesn't directly support • Implement the <code>fscwmgmgen.BranchManagementAssociationHandler</code> interface • Return a list of Branch Unit Related Records • Populate at least the minimum required fields in each Branch Unit Related Record: <ul style="list-style-type: none"> – BranchUnitId: Represents the current branch unit of the user or contact – BusinessUnitMemberId: The Banker ID of the user or contact – RelatedRecordId: The ID of the custom object to be related <p>This field is a relationship field.</p> <p>Relationship Name AssociationHandlerApexClass</p> <p>Relationship Type Lookup</p> <p>Refers To ApexClass</p>
AssociationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	Description
	<p>The association type.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • BranchManagement
Description	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>A description of the association criteria.</p>
DeveloperName	Type
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	<p>The developer name of the association criteria.</p>
EventType	Type
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	<p>The type of reference object event that triggers creation of the association.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Create
	<ul style="list-style-type: none"> • Update
Language	Type
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	<p>Supported languages for the association criteria.</p>
MasterLabel	Type
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description
	The master label of the association criteria. This internal label doesn't get translated.
NamespacePrefix	Type
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The namespace prefix of the association criteria.
PreCondition	Type
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	A formula that, when true, causes a new association to be created.
ReferenceObject	Type
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	The reference object for the association criteria.
	Possible values are:
	<ul style="list-style-type: none"> • Account • Case • Contact • InteractionSummary • Lead • Opportunity • Custom objects
SelectedOwnerField	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A field to use instead of the default Owner ID.
Status	Type
	picklist

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>
	<p>Description The status of the association criteria. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive

Associated Objects

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

[RelatedRecordAssocCriteriaChangeEventChangeEvent](#) on page 956

Change events are available for the object.

ResidentialLoanApplication

Represents details about a loan application from the lender. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account related to the loan application.</p>
AmortizationTerm	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description Duration of the loan in months.
AmortizationType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Amortization type for the loan. Possible values are: <ul style="list-style-type: none"> • Adjustable Rate • Fixed Rate • Other
ApplicationExtIdentifier	Type string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description ID that uniquely identifies imported data in an external data source (if applicable).
BalloonTermMonths	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Number of months during which the cumulative loan must be repaid.
EstateHoldType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lender's lien is on both land and structure (fee simple) or just structure (leasehold). Possible values are: <ul style="list-style-type: none"> • Fee Simple • Leasehold
HasOtherLoanFeature	Type boolean

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether loan has other amortization feature.</p>
HasPrepaymentPenalty	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.</p>
ImprovementCost	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Construction costs for a construction loan or home improvement costs for a renovation loan.</p>
InitialBuydownRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Initial lesser interest rate for the loan.</p>
IntOnlyTermMonthCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Number of months that loan payments are interest only.</p>
InterestRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Interest rate for the loan.</p>

Field	Details
IsBalloon	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether borrower is applying for a balloon payment mortgage.
IsBorrowerCommPropState	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether at least one borrower lives in a community property state.
IsConstructionConversion	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether loan proceeds to provide permanent financing replacing interim construction financing.
IsContractConversion	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.
IsEnergyRelImprovement	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether loan is to finance energy-related improvements.
IsInterestOnly	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower is applying for an interest-only mortgage.
IsNegativeAmortization	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.
IsPropertyCommPropState	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether property is located in a community property state.
IsRenovation	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.
IsSingleClosing	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, the loan converts to a traditional mortgage.
IsSubjectToPriorityLien	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.

Field	Details
IsTempIntRateBuydown	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LeaseHoldExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date when leasehold expires if land is leased.</p>
LoanPurpose	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description What the borrower will use the loan for.</p> <p>Values are:</p> <ul style="list-style-type: none"> • Other • Purchase • Refinance

Field	Details
LotAcquiredDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date the property or land was purchased.</p>
LotOriginalCost	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Original property cost (refinance) or original land cost (construction).</p>
MonthsBeforeFirstAdj	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Number of months before the first rate adjustment for an adjustable rate loan.</p>
MonthsBetweenAdjustments	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Number of months between subsequent rate adjustments for an adjustable rate loan.</p>
MortgageLienType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of mortgage lien associated with this loan application.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • First Lien • Subordinate Lien
MortgageProgramType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Type of mortgage program applied for. Values are:</p> <ul style="list-style-type: none"> • Conventional • FHA • Other • USDA Rural Housing Service • VA
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the residential loan application.</p>
NativeLandTenure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use. Possible values are:</p> <ul style="list-style-type: none"> • Alaska Native Corporation Land • Fee Simple (On a Reservation) • Individual Trust Land (Allotted/Restricted) • Tribal Trust Land (Off Reservation) • Tribal Trust Land (On a Reservation)
OpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the opportunity associated with the loan application.</p>

Field	Details
OtherAmortizationType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of other amortization type for government loans.</p>
OtherLoanFeature	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of other loan amortization feature.</p>
OtherLoanPurpose	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description What the borrower will use the loan for if other was specified.</p>
OtherMortgageProgramType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the other mortgage type.</p>
OtherRefinanceProgType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Refinance program name if other was specified.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record.</p>

Field	Details
PrepayPenaltyTermMonth	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Number of months during which borrower incurs a penalty for early payoff of the loan balance.</p>
ProjectType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of project that the property belongs to. Possible values are:<ul style="list-style-type: none">• Condominium• Cooperative• Planned Unit Development (PUD)• Property is not located in a project</p>
RefinanceProgramType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicable refinance program type based on the investor, guarantor, or lender guidelines. Possible values are:<ul style="list-style-type: none">• Full Documentation• Interest Rate Reduction• Other• Streamlined without Appraisal</p>
RefinanceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Refinance loan type. Possible values are:<ul style="list-style-type: none">• Cash Out</p>

Field	Details
	<ul style="list-style-type: none"> • Limited Cash Out • No Cash Out
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the current status of the loan application.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • New • Pending
TitleType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Way the borrower or borrowers take title for the loan.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Joint Tenancy with Right of Survivorship • Life Estate • Other • Sole Ownership • Tenancy by the Entirety • Tenancy in Common
TotalFinLiabilityMonthlyAmt	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.</p>
TotalFinancialAssetAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description Total amount of borrowers' financial account assets excluding real estate.</p>
TotalOtherAssetAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total amount of borrowers' other assets excluding real estate.</p>
TotalOtherFinLiabilityMonthlyAmt	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.</p>
TrustTitleType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Title to be held in a living trust or a land trust. Possible values are:<ul style="list-style-type: none"> • Title Will be Held by a Land Trust • Title Will be Held by an Inter Vivos (Living) Trust </p>

Associated Objects

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

[ResidentialLoanApplicationFeed](#)

Feed tracking is available for the object.

[ResidentialLoanApplicationHistory](#)

History is available for tracked fields of the object.

[ResidentialLoanApplicationOwnerSharingRule](#)

Sharing rules are available for the object.

[ResidentialLoanApplicationShare](#)

Sharing is available for the object.

RetrievalSummaryDefField

Represents a table that stores the fields to retrieve from the target object of a rollup definition. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
Field	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The field to retrieve.</p>
RetrievalSummaryDefOrObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The related retrieval summary definition or node. This field is a polymorphic relationship field.</p> <p>Relationship Name RetrievalSummaryDefOrObject</p> <p>Relationship Type Master-detail</p> <p>Refers To RetrievalSummaryDefObject, RetrievalSummaryDefinition (the master object)</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The order that the rollup definition shows in the setup UI and API result.</p>

RetrievalSummaryDefinition

Represents a table that stores the header information of a retrieval definition. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The master label of the retrieval summary definition.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace prefix associated with the retrieval summary definition.</p>
RootObject	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>
	<p>Description The root node object.</p>

RetrievalSummaryDefObject

Represents a table that stores the rollup definitions of a retrieval definition. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
RecordAggregationDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rollup definition that determines the records to retrieve. This field is a relationship field.</p> <p>Relationship Name RecordAggregationDefinition</p> <p>Refers To RecordAggregationDefinition</p>
RetrievalSummaryDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the related Retrieval Summary Definition. This field is a relationship field.</p> <p>Relationship Name RetrievalSummaryDefinition</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To RetrievalSummaryDefinition (the master object)</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The order that the rollup definition shows in the setup UI and API result.</p>

SecuritiesHolding

Represents the securities associated with an insurance policy. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
AssetCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The subcategory of asset type. Possible values are:</p> <ul style="list-style-type: none"> Allocation Alternative Commodities International Equity Municipal Bond Sector Equity Taxable Bond U.S. Equity

Field	Details
AssetCategoryName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The market capitalization and investing style. Possible values are:</p> <ul style="list-style-type: none"> • Large Blend • Large Growth • Large Value • Mid-Cap Blend • Mid-Cap Growth • Mid-Cap Value • Small Blend • Small Growth • Small Value
AssetClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The major category of asset type. Possible values are:</p> <ul style="list-style-type: none"> • Alternative Investments • Cash Equivalents • Equities • Fixed Income
FinancialAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial account associated with the securities holding. This field is a relationship field.</p> <p>Relationship Name FinancialAccount</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To FinancialAccount</p>
FinancialSecurityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial security associated with the securities holding. This field is a relationship field.</p> <p>Relationship Name FinancialSecurity</p> <p>Relationship Type Lookup</p> <p>Refers To FinancialSecurity</p>
GainLoss	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Change in the value of this holding since its purchase.</p>
HouseholdId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The household this holding rolls up to. This field is a relationship field.</p> <p>Relationship Name Household</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>

Field	Details
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy this holding is related to. This field is a relationship field.</p> <p>Relationship Name InsurancePolicy</p> <p>Relationship Type Lookup</p> <p>Refers To InsurancePolicy</p>
InvestmentEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description End date of the investment.</p>
InvestmentStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Start date of the investment.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastUpdated	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp for when data for this holding was last updated by an external data source.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MarketValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The current market value of this holding.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the holding.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
PercentChange	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percent change in the value of this holding since its purchase.</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Current price per share.</p>
PrimaryOwnerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary owner of this holding.</p>
PurchasePrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Price per share at the time of purchase.</p>
Sector	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Group of related or common stocks.</p>
Shares	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number of shares held.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system this record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
Description	The ID of this record in the source system. This field is unique within your organization.

Associated Objects

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

[SecuritiesHoldingChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[SecuritiesHoldingFeed](#)

Feed tracking is available for the object.

[SecuritiesHoldingHistory](#)

History is available for tracked fields of the object.

[SecuritiesHoldingShare](#)

Sharing is available for the object.

StageTransitionEntry

Represents the information about the runtime instance of the object stage transition. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
FromStageValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the value of object state before the transition. This field is a relationship field.</p> <p>Relationship Name FromStageValue</p> <p>Refers To StageValue</p>

Field	Details
FulfillmentPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Defines the plan for object stage transition. This field is a relationship field.</p> <p>Relationship Name FulfillmentPlan</p> <p>Refers To FulfillmentPlan</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the stage transition entry record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceRecord	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The record ID of the associated stage transition.</p>
StageTransitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The object state transition associated with the object state transition instance. This field is a relationship field.</p> <p>Relationship Name StageTransition</p> <p>Refers To StageTransition</p>
StageTransitionPlanStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The transition plan status. Possible values are: <ul style="list-style-type: none"> Completed InProgress—In Progress New </p>
ToStageValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the value of object state after the transition.</p>

Field	Details
	This field is a relationship field.
Relationship Name	
	ToStageValue
Refers To	
	StageValue

StgTrnsUndwrEvaluation

Represents the underwriting rule evaluation result. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
EvaluationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time at which rules were applied to the target object.</p>
EvaluationResult	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The result of evaluation done on all rules for a transaction.</p>
IsRuleEvaluationSuccessful	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stage transition was successful (true) or not (false). The default value is <code>false</code>.</p>

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

Field	Details
	<p>Relationship Name ReferenceObject</p> <p>Refers To InsurancePolicy, Quote</p>
ReferenceObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the object for which the underwriting rule was evaluated.</p>
ReferenceObjectStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the reference object after the underwriting rule evaluation is completed.</p>
StageTransition	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The stage transition ID for which the underwriting rule was evaluated.</p>

Associated Objects

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

[StgTrnsUndwrEvaluationHistory on page 968](#)

History is available for tracked fields of the object.

[StgTrnsUndwrEvaluationOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[StgTrnsUndwrEvaluationShare on page 976](#)

Sharing is available for the object.

Surcharge

Represents the details about a surcharge calculation. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The surcharge as a flat amount.</p>
CalculationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of calculation or process used to determine the surcharge. Possible values are:</p> <ul style="list-style-type: none"> • Amount • Expression Set • Percentage
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the surcharge.</p>
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the surcharge becomes active.</p>
EffectiveToDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the surcharge becomes inactive.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the surcharge is active (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the surcharge.</p>
ProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the expression set or integration procedure that's used to calculate the surcharge.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name Procedure</p> <p>Refers To ExpressionSet</p>
Rate	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The surcharge amount as a percentage.</p>
SurchargeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the surcharge.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Tax

Associated Objects

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

[SurchargeHistory on page 968](#)

History is available for tracked fields of the object in API version 64.0 and later.

[SurchargeOwnerSharingRule on page 973](#)

Sharing rules are available for the object in API version 64.0 and later.

[SurchargeShare on page 976](#)

Sharing is available for the object in API version 64.0 and later.

SvcCatalogItemAttribute

Represents pre-filled fulfillment flow inputs and user questions to ask to users in the context of a service catalog item version. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Type of the attribute used to determine if it's a pre-filled input or a questions to ask to users. Possible values are:</p> <ul style="list-style-type: none"> • Base • Extended <p>The default value is Extended.</p>
DataType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of the attribute value used into to render questions and validate data filled by users. Possible values are:</p> <ul style="list-style-type: none"> • Attachment • Checkbox • Currency • Date • Datetime • DisplayText • Email • IPAddress • Integer • ListOfBoolean • ListOfDouble • ListOfInteger • ListOfMaps • ListOfString • Lookup • Map • MultilineText • Number • NumericScale

Field	Details
	<ul style="list-style-type: none"> • Percentage • Picklist • Queue • SinglelineText • Text • URL <p>The default value is Text.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the service catalog item attribute.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Unique name in the scope of a Service Catalog Item Version.</p>
FieldIdentifier	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unique identifier of the custom or standard field. Possible values are:</p> <ul style="list-style-type: none"> • CaseId • CatalogItemDescription • CatalogItemName • CloneSourceId • ClosedDate • CreatedById • CreatedDate • Id • IsClosed • IsDeleted • ItemFlowVersion

Field	Details
	<ul style="list-style-type: none"> • ItemFlowVersionLookupId • LastModifiedById • LastModifiedDate • LastReferencedDate • LastViewedDate • Name • OwnerId • SubmitterId • SvcCatalogItemDefinitionId • SystemModstamp • UserRecordAccessId
InputVariable	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the input variable in which the attribute value will be forwarded.</p>
InputVariableValue	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Attribute value defined by the catalog builder.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the service catalog item attribute is required. The default value is <code>false</code>.</p>
ItemVersionStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the status of the service catalog item version for which the attribute is defined.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Obsolete <p>The default value is <code>Draft</code>.</p>
Label	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A label for the service catalog item attribute.</p>
ParentAttributeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The associated record. This field is a relationship field.</p> <p>Relationship Name ParentAttribute</p> <p>Relationship Type Lookup</p> <p>Refers To SvcCatalogItemAttribute</p>
SortOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Sort order used to display questions in a specific order.</p>
SvcCatalogItemDefId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The service catalog item definition for which the attribute is defined. This field is a relationship field.</p>

Field	Details
Relationship Name	SvcCatalogItemDef
Relationship Type	Lookup
Refers To	SvcCatalogItemDef

SvcCatalogItemDependency

Represents a collection of records that indicate the dependencies of a service process. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
DependencyReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object that's associated with the dependency. This field is a polymorphic relationship field.</p> <p>Relationship Name DependencyReference</p> <p>Relationship Type Lookup</p> <p>Refers To ApexClass, IntegrationProviderDef, OmniScriptConfig</p>
ProcessStepName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The name of the step in the creation process of the service process definition.</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> • FulfillmentFlow • IntegrationDefinition • Preprocessor • RequestForm <p>Available in API version 62.0 and later.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of dependency. Possible values are:</p> <ul style="list-style-type: none"> • FlowDefinition—Flow Definition • IntegrationProviderDef—Integration Provider Definition • OmniScriptConfig—Omni Script Configuration • PreprocessorApexClass—Preprocessor Apex Class

TagCategory

Group similar interest tags together into tag categories. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A detailed description of the tag category.</p>

Field	Details
Icon	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Icon to visually represent your tag category.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the tag category is still active (<code>true</code>) or has been dismissed (<code>false</code>). The default value is '<code>false</code>'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Level	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Create a hierarchy of levels of tag categories.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of the tag category.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the tag category. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user, account, or contact associated with the tag category. This is a relationship field.</p> <p>Relationship Name ParentCategory</p> <p>Relationship Type Lookup</p> <p>Refers To TagCategory</p>

Term

Represents a term or a condition offered to the customer. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description for the term offered.</p>
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective start date of the term.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The expiration date of the term.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the term offered is active. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the associated location was last modified.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date the associated location was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the term.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Owner ID of the term. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Subtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the subtype of a term offered.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of a term offered. Possible values are:</p> <ul style="list-style-type: none"> Additional Details

TermRelatedObject

Represents the relationship between a term and the object for which the term is defined. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The effective date of the term associated with the related object.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The expiration date of the term associated with the related object.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the term associated with the related object is active. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date the associated location was last modified.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the associated location was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the term related object.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Owner ID of the term related object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference object for which a term is applicable. For example, a term applicable for a financial product. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Refers To Product2</p>
TermId	<p>Type reference</p>

Field	Details
Properties	Create, Filter, Group, Sort, Update
Description	The term applicable for the related object.
	This field is a relationship field.
Relationship Name	Term
Refers To	Term

Associated Objects

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

[TermRelatedObjectChangeEvent on page 956](#)

Change events are available for the object.

[TermRelatedObjectFeed on page 960](#)

Feed tracking is available for the object.

[TermRelatedObjectHistory on page 968](#)

History is available for tracked fields of the object.

[TermRelatedObjectOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[TermRelatedObjectShare on page 976](#)

Sharing is available for the object.

UnderwritingRule

Represents details of an underwriting rule for a product. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
ApiName	Type
	string

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p>
	<p>Description The API name of the underwriting rule.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description about the underwriting rule.</p>
DynamicRuleDefinition	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The scope and conditions specified for the dynamic rule.</p>
EffectiveFromDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time from when the underwriting rule became active.</p>
Effective.ToDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time after when the underwriting rules became inactive.</p>
EvaluationFailureTaskGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group of tasks related to a fulfillment plan that's executed when the rule evaluation fails. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name EvaluationFailureTaskGroup</p> <p>Refers To FulfillmentStepDefinitionGroup</p>
EvaluationSuccessTaskGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The group of tasks related to a fulfillment plan that's executed when the rule evaluation is successful. This field is a relationship field.</p> <p>Relationship Name EvaluationSuccessTaskGroup</p> <p>Refers To FulfillmentStepDefinitionGroup</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the underwriting rule.</p>

Field	Details
ProductPath	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A path containing the product IDs that roll up to the parent product.</p>
Sequence	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The sequence in which the rule is executed.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the status of the underwriting rule. Possible values are:<ul style="list-style-type: none"> • Active • Draft • Inactive The default value is <code>Draft</code>.</p>
UnderwritingRuleGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The underwriting rule group associated with this underwriting rule. This field is a relationship field.</p> <p>Relationship Name UnderwritingRuleGroup</p> <p>Relationship Type Master-detail</p> <p>Refers To UnderwritingRuleGroup (the master object)</p>

Associated Objects

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

[UnderwritingRuleHistory on page 968](#)

History is available for tracked fields of the object.

UnderwritingRuleGroup

Represents the underwriting rule that's associated with a product. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
EvaluationCriteria	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The criteria used to evaluate the underwriting rule.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the underwriting rule.</p>
ObjectName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The name of the object to which the underwriting rules apply.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • InsurancePolicy • Quote
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product associated with the underwriting rule.</p> <p>This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
RuleSetApiName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The API name of the rule set that's created during the underwriting rule creation.</p>
StageTransition	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the stage transition to which the underwriting rules apply.</p>
StageTransitionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the stage transition.</p>

Associated Objects

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

[UnderwritingRuleGroupHistory on page 968](#)

History is available for tracked fields of the object.

[UnderwritingRuleGroupOwnerSharingRule on page 973](#)

Sharing rules are available for the object.

[UnderwritingRuleGroupShare on page 976](#)

Sharing is available for the object.

UserFinancialAuthority

Represents the maximum monetary amount a user can authorize for a given financial type and product. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The configuration details for the user financial authority record. This field can't be edited.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date when the user financial authority is in effect.</p>
EvaluationMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The logic that validates the user financial authority. For example, the Claim Coverage Valuation method validates that a payment on a claim coverage doesn't exceed the maximum amount allowed for the user on that claim coverage product.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Claim Coverage Valuation
FinancialType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The financial type associated with the user financial authority.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Claim Expense Claim Loss
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MaximumApprovalAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The maximum monetary amount a user can approve for a financial activity.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The name of the financial user authority.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner associated with the user financial authority. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The product associated with the user financial authority. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The start date when the user financial authority is in effect.</p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The user associated with the user financial authority. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>

Associated Objects

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

[UserFinancialAuthorityChangeEvent on page 956](#)

Change events are available for the object in API version 63.0 and later.

UserFinancialAuthorityHistory on page 968

History is available for tracked fields of the object.

UserFinancialAuthorityOwnerSharingRule on page 973

Sharing rules are available for the object.

UserFinancialAuthorityShare on page 976

Sharing is available for the object.

VendorProject

Represents information about a vendor's project for which the loan was applied. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
ApprovalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The financial institute's approval status for the vendor project.
ApproverId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The User associated with the vendor project. The user is from the financial institute that approves the project. This field is a relationship field. Relationship Name Approver Refers To User
EndDate	Type date

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The scheduled end date of the vendor project.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Location associated with the vendor project. This field is a relationship field.</p> <p>Relationship Name Location</p> <p>Refers To Location</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the vendor's project.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PhoneNumber	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phone number of the project's representative. For example, the phone number of project manager or site lead.</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The price of the vendor project.</p>
Stage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current stage of this project.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the vendor project.</p>
VendorId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the vendor project for which the loan was applied. This field is a relationship field.</p> <p>Relationship Name Vendor</p> <p>Refers To Account</p>
VendorName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the vendor.</p>
VendorProjectContact	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the project representative.</p>

WealthAppConfig

Represents configuration information for Financial Services Cloud functionality.

Supported Calls

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

Fields

Field	Details
InteractionUpdateFrequency	<p>Type double</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Frequency (in minutes) with which the Last Interaction and Next Interaction dates are automatically updated. Default is 15 min.</p>
RejectedReferralStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lead status used to identify rejected referrals.</p>

WorkerCompCoverageClass

Represents the compensation coverage class that a worker belongs to. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyCoverageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The coverages included in the insurance policy.</p>
InsurancePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy that covers this compensation coverage class.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the compensation coverage class.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
Premium	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The premium for the insurance policy that covers this compensation coverage class.</p>
TotalExposure	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The payroll that the employees of this compensation coverage class belong to.
WorkerClass	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The code that represents the compensation class of the employees.
	Possible values are:
	<ul style="list-style-type: none"> • 1701 Abrasive Wheel Mfg. & Drivers • 1748 Abrasive Wheel Mfg. & Drivers • 1860 Abrasive Paper or Cloth Preparation
WorkerCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of employees in this compensation coverage class.
WorkerLocationId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The location where the worker is employed.

Associated Objects

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

[WorkerCompCoverageClassChangeEvent on page 956](#)

Change events are available for the object in API version 62.0 and later.

[WorkerCompCoverageClassFeed](#)

Feed tracking is available for the object.

[WorkerCompCoverageClassHistory](#)

History is available for tracked fields of the object.

[WorkerCompCoverageClassOwnerSharingRule](#)

Sharing rules are available for the object.

WorkerCompCoverageClassShare

Sharing is available for the object.

FINANCIAL SERVICES CLOUD CUSTOM OBJECTS

FinServ Account Custom Fields

Represents information about an individual that pertains to their dealings with your firm, such as their review frequency or service tier. Custom fields extend the standard Account object for use in Financial Services Cloud.

Fields

Field Name	Details
AssetCategory__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subcategory of asset type. Possible values are:</p> <ul style="list-style-type: none">AllocationAlternativeCommoditiesInternational EquityMunicipal BondSector EquityTaxable BondU.S. Equity
AssetCategoryName__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The market capitalization and investing style. Possible values are:</p> <ul style="list-style-type: none">Large GrowthLarge ValueLarge BlendSmall GrowthSmall ValueSmall BlendMid-Cap Growth

Field Name	Details
	<ul style="list-style-type: none"> • Mid-Cap Value • Mid-Cap Blend
AssetClass__c	Type picklist
Properties Create, Filter, Group, Nillable, Sort, Update	Description The major category of asset type. Possible values are: <ul style="list-style-type: none"> • Alternative Investments • Cash Equivalents • Equities • Fixed Income
AUM__c	Type currency
Properties Filter, Nillable, Sort	Description Value of this individual's financial accounts that your firm manages. Calculated as the sum of <code>TotalAUMPrimaryOwner__c</code> and <code>TotalAUMJointOwner__c</code> .
BankNumber__c	Type string
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	Identifies a financial institution for electronic purposes.
BorrowingHistory__c	Type picklist
Properties	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description	Rating of this individual's borrowing history.
Valid values:	
	<ul style="list-style-type: none"> • Excellent
	<ul style="list-style-type: none"> • Moderate
	<ul style="list-style-type: none"> • Poor
	<ul style="list-style-type: none"> • Limited to No History

Field Name	Details
IsDisputed__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the financial transaction is a disputed transaction.</p>
BorrowingPriorities__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Primary goal for loan application.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Build Equity • Debt Consolidation • Education • Investments • Large Capital Purchases • Property Purchase • Renovations
BranchCode__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies an office or building of a financial institution. Code format is based on the financial institution.</p> <p>Record type for this account. The value is copied from <code>RecordType.Name</code> and can't be changed.</p>
BranchName__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Location name for a financial institution office.</p> <p>Record type for this account. The value is copied from <code>RecordType.Name</code> and can't be changed.</p>

Field Name	Details
ClaimsOnHouseholdPolicies__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of claims raised for the active policies that the policyholder's primary household owns.</p>
ClientCategory__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Rates the value of this individual's business with your firm. Label is Category. Valid values:</p> <ul style="list-style-type: none"> • Platinum • Gold • Silver • Bronze • Investments
CreatedByMe__c	<p>Type integer</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the user contact was converted from this lead.</p>
CreditRating__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Assessment of creditworthiness.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Excellent • Good • Fair • Poor

Field Name	Details
CreditScore__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Numerical rating of borrower's creditworthiness.</p>
ConversionDateTime__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The time and date on which the lead was converted.</p>
CustomerID__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial institution's identification number for this individual (80 characters) Record type for this account. The value is copied from <code>RecordType.Name</code> and can't be changed.</p>
CustomerSegment__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Individual's market segment. Valid values:</p> <ul style="list-style-type: none"> • Borrower • Long-Term Growth • Mass Affluent • Mass Market • Millennial • Transactional • Wealth Accumulation
CustomerType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Individual's financial category. Valid values: <ul style="list-style-type: none"> • Borrower • Investor • Relational • Transaction </p>
DisputeReason__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Reason for the dispute. Valid values are: <ul style="list-style-type: none"> • Duplicate Transactions • Transaction not recognized • Suspected Fraud • Others </p>
EventLocation__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the life event occurred. This is a compound field of type Address and combines these fields: <ul style="list-style-type: none"> • EventLocationCity • EventLocationCountry • EventLocationGeocodeAccuracy • EventLocationLatitude • EventLocationLongitude • EventLocationPostalCode • EventLocationState • EventLocationStreet </p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	Represents the financial account, such as an investment account, bank account, or insurance policy, that is associated with this case.
FinancialInterests__c	Type multipicklist
	Properties
	Create, Filter, Nullable, Update
	Description
	This individual's financial areas of interest. Valid values:
	<ul style="list-style-type: none"> • Municipal Bonds • Fixed Income • Energy • Technology • CRM • AAPL • GOOG • Retirement • College Planning
Household__c	Type reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The household with which this opportunity is associated.
HouseholdPolicies__c	Type double
	Properties
	Create, Filter, Nullable, Sort, Update
	Description
	The total number of active policies that the policyholder's primary household owns.
IndividualId__c	Type string
	Properties
	Create, Filter, Group, Nullable, Sort, Update

Field Name	Details
	<p>Description Read only. Unique ID that relates this individual's account record to its contact record.</p>
IndividualType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Type of individual. Valid values:</p> <ul style="list-style-type: none"> • Individual • Group • (Blank) - If this value is blank, then the Individual Type is Business. <p> Note: This field is for Salesforce internal-use only. This field can't be changed.</p>
InvestmentExperience__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description This individual's investment experience. Valid values:</p> <ul style="list-style-type: none"> • Experienced • Moderately Experienced • Moderately Inexperienced • Inexperienced
InvestmentObjectives__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nullable, Update</p> <p>Description This individual's preference for growth versus income investments. Valid values:</p> <ul style="list-style-type: none"> • Conservative Income • Income • Balanced • Growth • Aggressive Growth

Field Name	Details
KYCDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the Know Your Customer compliance program was completed for this individual.</p>
KYCStatus__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the Know Your Customer compliance program for a specific individual.</p>
LastInteraction__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last meeting or call.</p>
LastReview__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last review.</p>
LastTransactionDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last transaction.</p>
LastTransactionDateJointOwner__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
LastTransactionDatePrimaryOwner__c	<p>Description Date of the last transaction - joint owner.</p>
LastUsedChannel__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last transaction - primary owner.</p>
LengthOfRelationship__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Most recent contact channel. Valid values:</p> <ul style="list-style-type: none"> • Branch • Call Center • Mobile • Web • Other
LifetimeValue__c	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Individual's tenure with the financial institution.</p>
MarketingSegment__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Individual's lifetime net asset value to your financial institution.</p>
	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p>

Field Name	Details
	Description
	Market segments that characterize this individual. Valid values:
	<ul style="list-style-type: none"> • Mass Affluent • High Net Worth • Female Investor • Millennial
NetWorth__c	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Value of this individual's assets minus liabilities.
NextInteraction__c	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date of the next meeting or call.
NextReview__c	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date of the next review.
NextStatementDate__c	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date of the next statement.
Notes__c	Type
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Important notes about the individual. Label is <code>Important_Notes</code> .

Field Name	Details
PersonalInterests__c	Type multipicklist
	Properties Create, Filter, Nillable, Update
	Description Personal areas of interest. Valid values: <ul style="list-style-type: none"> • Cooking • College Basketball • Environment • Hiking • Biking • Wine
PrimaryContact__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Read only. ID of the contact record associated with this individual's account record.
RecordTypeName__c	Type string
	Properties Filter, Nillable, Sort
	Description Record type for this account. The value is copied from <code>RecordType.Name</code> and can't be changed.
ReferredByContact__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description External contact referring this individual.
ReferredByUser__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Internal Salesforce user who made the referral.
RelationshipStartDate__c	Type date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date this individual started working with your company.
ReviewFrequency__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Frequency of reviews. Valid values:
	<ul style="list-style-type: none"> • Monthly • Quarterly • Annually
RiskTolerance__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Level of risk this individual is comfortable with. Valid values:
	<ul style="list-style-type: none"> • Aggressive • Conservative • Moderate • None
ServiceModel__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Service level assigned to this individual. Valid values:
	<ul style="list-style-type: none"> • Tier 1 • Tier 2 • Tier 3

Field Name	Details
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies this individual in an external data source.</p>
Stage__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the stage of the deal. Possible values are:</p> <ul style="list-style-type: none"> • Closed • Execution • Mandate • Pitch
Status__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Individual's status with your firm. Valid values:</p> <ul style="list-style-type: none"> • Active • Closed • Deceased • Delinquent • Dormant • Inactive • Onboarding • Prospect
TimeHorizon__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Individual's investment time frame. Valid values:</p> <ul style="list-style-type: none"> • Long Term

Field Name	Details
	<ul style="list-style-type: none"> Medium Term Short Term
TotalAUMJointOwner__c	Type currency
Properties Create, Defaulted on create, Filter, Nillable, Sort, Update	Description Total value of financial accounts that your company manages, for which this individual is the joint owner of jointly owned accounts.
TotalAUMPrimaryOwner__c	Type currency
Properties Create, Defaulted on create, Filter, Nillable, Sort, Update	Description Total value of financial accounts that your company manages, for which this individual is the primary owner of either separately owned or jointly owned accounts.
TotalBankDeposits__c	Type currency
Properties Filter, Nillable, Sort	Description Value of this individual's accounts. Calculated as the sum of TotalBankDepositsPrimaryOwner__c and TotalBankDepositsJointOwner__c .
TotalBankDepositsJointOwner__c	Type currency
Properties Create, Defaulted on create, Filter, Nillable, Sort, Update	Description Total value of accounts, for which this individual is the joint owner of jointly owned accounts.
TotalBankDepositsPrimaryOwner__c	Type currency
Properties Create, Defaulted on create, Filter, Nillable, Sort, Update	

Field Name	Details
TotalClaimAmountPaid__c	<p>Description Total value of accounts, for which this individual is the primary owner of either separately owned or jointly owned accounts.</p>
TotalFinAcctsJointOwner__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount paid for all claims for the active policies for a policyholder's primary household.</p>
TotalFinAcctsPrimaryOwner__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total value of financial account balances (excluding insurance policies), for which this individual is the joint owner of jointly owned accounts. Label is Total Financial Accounts Joint Owner.</p>
TotalFinancialAccounts__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total value of financial account balances (excluding insurance policies), for which this individual is the primary owner of either separately owned or jointly owned accounts. Label is Total Financial Accounts Primary Owner.</p>
TotalHeldFinAcctsJointOwner__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of all financial accounts, excluding insurance policies. Calculated as the sum of TotalBankDeposits__c and TotalInvestments__c.</p>
	<p>Type double</p>

Field Name	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Total value of held financial account balances, for which this individual is the joint owner of jointly owned accounts. Label is <code>Total Held Financial Accounts Joint</code> .
<code>TotalHeldFinAcctsPrimaryOwner__c</code>	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Total value of held financial account balances, for which this individual is the primary owner of either separately owned or jointly owned accounts. Label is <code>Total Held Financial Accounts Primary</code> .
<code>TotalHouseholdPremiums__c</code>	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total premiums for all active policies for a policyholder's primary household.
<code>TotalInsurance__c</code>	Type
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Value of this individual's insurance policies. Calculated as the sum of <code>TotalInsurancePrimaryOwner__c</code> and <code>TotalInsuranceJointOwner__c</code> .
<code>TotalInsuranceJointOwner__c</code>	Type
	currency
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description
	Total value of insurance policies, for which the individual is the joint owner of jointly owned accounts.

Field Name	Details
TotalInsurancePrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of insurance policies, for which the individual is the primary owner of either separately owned or jointly owned accounts.</p>
TotalInvestments__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of investment accounts. Calculated as the sum of TotalInvestmentsPrimaryOwner__c and TotalInvestmentsJointOwner__c.</p>
TotalInvestmentsJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of investment accounts, for which the individual is the joint owner of jointly owned accounts.</p>
TotalInvestmentsPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of investment accounts, for which the individual is the primary owner of either separately owned or jointly owned accounts.</p>
TotalLiabilities__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Value of individual's liabilities, stored as a negative value. Calculated as the sum of TotalLiabilitiesPrimaryOwner__c and TotalLiabilitiesJointOwner__c.</p>

Field Name	Details
TotalLiabilitiesJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of liabilities, for which this individual is the joint owner of jointly owned liabilities.</p>
TotalLiabilitiesPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of liabilities, for which this individual is the primary owner of either separately owned or jointly owned liabilities.</p>
TotalNonfinancialAssets__c	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of tangible assets such as collectibles or precious metals. Calculated as the sum of <code>TotalNonfinancialAssetsPrimaryOwner__c</code> and <code>TotalNonfinancialAssetsJointOwner__c</code>.</p>
TotalNonfinancialAssetsJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of tangible assets such as collectibles or precious metals, for which this individual is the joint owner of jointly owned assets.</p>
TotalNonfinancialAssetsPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of tangible assets such as collectibles or precious metals, for which this individual is the primary owner of either separately owned or jointly owned assets.</p>

Field Name	Details
TotalNumberOfFinAccounts__c	<p>Type Integer</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total numbers of financial accounts that are managed by a specific firm.</p>
TotalNumberOfFinAccountsJointOwner__c	<p>Type Integer</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total numbers of financial accounts for which the client is a joint owner.</p>
TotalNumberOfFinAccountsPrimaryOwner__c	<p>Type Integer</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total numbers of financial accounts for which the client is the primary owner.</p>
TotalOutstandingCredit__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of a client's total outstanding credit from the financial accounts that are managed by a specific firm.</p>
TotalOutstandingCreditJointOwner__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of the total outstanding credit for which the client is a joint owner from the financial accounts that are managed by a specific firm.</p>
TotalOutstandingCreditPrimaryOwner__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field Name	Details
	Description Value of the total outstanding credit for which the client is the primary owner from the financial accounts that are managed by a specific firm.
TotalPremium__c	Type currency Properties Create, Filter, Nillable, Sort, Update
	Description Policyholder's total annual premium.
TotalRevenue__c	Type currency Properties Create, Filter, Nillable, Sort, Update
	Description Total amount of revenue for a client.
TransactionSubtype__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Subtype of transaction, such as: <ul style="list-style-type: none"> • Cash Deposit • On-Us Check Deposit • Transit Check Deposit • Foreign Cash Deposit • Bill Payment • EFT • ATM Deposit • ATM Withdrawal • POS withdrawal • Misc. Credit • Misc. Debit • Loan Payment • Mortgage Payment • Credit Card Payment • Credit Card Cash Advance • Internal Funds Transfer

Field Name	Details
	<ul style="list-style-type: none"> • Reversal • Interest Earned • Fee • Merchant Charge
WaiverReason__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason for waiving the charges or fees, such as:</p> <ul style="list-style-type: none"> • Duplicate fees charged • Fees Discovery • Maintain customer relationship • Notification not received • Others
WalletShare__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Read only. Percentage of this individual's financial assets that your company manages or administers. Calculated as the percent of financial accounts that are held (<code>FinancialAccount__c.HeldAway</code> is <code>false</code>).</p>

FinServ_AccountAccountRelation__c

Represents a relationship between two accounts, such as between a household and a business account.

Supported Calls

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

Fields

 **Note:** To avoid DML errors on insert, read-only access at minimum is required for all fields that have a default value.

Field	Details
Account__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that RelatedAccount__c is related from.</p>
Active__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the relationship is active (true) or not (false). The default value is false.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
DeclarationType__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are:</p> <ul style="list-style-type: none"> • Official Register • Primary Research • Self declaration • Third Party • Verified
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Date when the relationship ended.</p>
ExternalId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
InverseRelationship__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between Account and RelatedAccount__c so that it can be referenced by a trigger that creates the inverse relationship record.</p>
IsShareholder__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-number identifier for the relationship. Label is Account Relation Name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record.</p>
RelatedAccount__c	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description Account that Account__c is related to.</p>
Role__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Role that describes how RelatedAccount__c is related to Account__c.</p>
ShareholderHierarchyLevel__c	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.</p>
ShareholderHierarchyRole__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the shareholder's ownership type. Possible values are: <ul style="list-style-type: none"> Domestic Ultimate Owner Immediate Shareholder Intermediate Shareholder Ultimate Beneficial Owner </p>
ShareholderType__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the type of the shareholder. Possible values are: <ul style="list-style-type: none"> Shareholding </p>

Field	Details
	<ul style="list-style-type: none"> • Voting Rights • Beneficiary of a Trust • Sole Proprietor • Partner
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Date when the relationship started.</p>
TotalSharePercent__c	<p>Type percent</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.</p>

FinServ AccountContactRelation Custom Fields

Represents the relationship between an individual (specifically the contact part of the individual) and the household (account) that the individual is a member of. AccountContactRelation is a standard object that is available through the Shared Contacts feature. Custom fields extend the AccountContactRelation standard object for use in Financial Services Cloud.

Supported Calls

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

Fields

Field	Details
DecisionMakingAuthorityType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the decision-making authority. Possible values are:</p> <ul style="list-style-type: none"> • Authorized Signatory • Board Member • Senior Managing Official
DeclarationType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are:</p> <ul style="list-style-type: none"> • Official Register • Primary Research • Self declaration • Third Party • Verified
IsDecisionMakingAuthority	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a decision-making authority (true) or not (false). The default value is <code>false</code>.</p>
IncludeInGroup__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Includes this account in a related individual's primary group.</p>
IsShareholder	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is <code>false</code>.</p>
Primary__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates the primary member of a group (<code>true</code>) or not (<code>false</code>).</p>
PrimaryGroup__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates a person's primary group. You can roll up summary fields only to a person's primary group if <code>PrimaryGroup__c</code> is set to <code>true</code>.</p>
Rollups__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Records associated with the individual that are included in household roll-up summaries. Valid values:</p> <ul style="list-style-type: none"> • All • Tasks • Events • Financial Accounts • Assets and Liabilities • Financial Goals

Field	Details
ShareholderHierarchyLevel	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.</p>
ShareholderHierarchyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the shareholder's ownership type. Possible values are:<ul style="list-style-type: none">• Domestic Ultimate Owner• Immediate Shareholder• Intermediate Shareholder• Ultimate Beneficial Owner</p>
ShareholderType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the shareholder. Possible values are:<ul style="list-style-type: none">• Shareholding• Voting Rights• Beneficiary of a Trust• Sole Proprietor• Partner</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the relationship between the applicant and the related applicant started.</p>

Field	Details
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
TotalSharePercent	<p>Type percent</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.</p>

FinServ_Alert__c

Represents notifications to alert advisors about their client accounts.

Supported Calls

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

Fields

Field	Details
Account__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description A lookup field to an account that alerts are related to.</p>
Active__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether an alert is active.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial account that alerts are related to.</p>
Message__c	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The main content of an alert.</p>
MessageDescription__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An optional description for the main content of an alert as specified in the <code>Message__c</code> field. This text appears below the main content.</p>
Priority__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description An indication of the urgency of an alert. Valid values:</p> <ul style="list-style-type: none"> • High • Low • Medium
Severity__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of alert. Valid values:</p>

Field	Details
	<ul style="list-style-type: none"> • Error • Info • Warning
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of a record from the external system that triggered the alert.</p>

FinServ_AssetsAndLiabilities__c

Represents assets or liabilities that are not represented in a client's financial accounts, such as real estate or collectibles.

Supported Calls

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

Fields

Field	Details
Amount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount of an asset (positive) or liability (negative).</p>
AssetsAndLiabilitiesSource__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Data source. Label is <code>Source</code>. Valid values:</p> <ul style="list-style-type: none"> • Manual Entry • Yodlee

Field	Details
AssetsAndLiabilitiesType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of asset or liability. Label is <code>Type</code>. Valid values:</p> <ul style="list-style-type: none"> • Auto Loan • Mortgage • Other • Personal Loan • Real Estate • Equipment • Automobile • Collection • Gold • Jewelry • Cash
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Description__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of this asset or liability.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial account that this asset or liability is related to.</p>

Field	Details
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Household that this asset or liability is associated with.</p>
JointOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Joint owner, if any, for this asset or liability.</p>
LastReferencedDate	<p>Type date</p> <p>Properties Filter, Nillable, Sort,</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this asset or liability.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on createFilter, Group, Sort, Update</p> <p>Description ID of the user who created the asset or liability record.</p>

Field	Details
Ownership__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of ownership for this asset or liability. Valid values:</p> <ul style="list-style-type: none"> • Individual • Joint • Trust
OwnerType__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's ownership role (primary or joint) for this asset or liability. The value is specified by a trigger.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this asset or liability.</p>
RecordTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this asset or liability.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the asset or liability in an external data source.</p>

FinServ AuthorizationForm Custom Fields

Represents the specific version and effective dates of a form that is associated with consent, such as a privacy policy or terms and conditions. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
AssociatedRegulation__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The specific regulation to which this authorization form is related.</p>
ConsentDurationDayCount__c	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Represents the number of days for which this Authorization Form is valid for, upon providing consent.</p>

Associated Objects

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

[AuthorizationFormHistory on page 968](#)

History is available for tracked fields of the object.

[AuthorizationFormShare on page 976](#)

Sharing is available for the object.

FinServ AuthorizationFormConsent Custom Fields

Represents the date and way in which a user consented to an authorization form. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Browser__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Collects data at the time of consent from the browser of the person providing consent.</p>
ConsentExpirationDateTime__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the length of time for which this particular consent, if accepted, lasts. This is a formula field that adds the Consent Captured Date time and Consent Duration Days on the Auth Form entity.</p>
Email__c	<p>Type email</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Collects data at the time of consent from the email address of the person providing consent.</p>
InfoAuthRequestFormId__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identification of the Information Authorization Request Form related to this record. This field is a relationship field.</p> <p>Relationship Name InfoAuthRequestForm</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To InfoAuthRequestForm</p>
IP__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Collects data at the time of consent from the IP address of the person providing consent.</p>
Location__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Collects data at the time of consent from the geo location of the person providing consent.</p>

Associated Objects

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

[AuthorizationFormConsentChangeEvent on page 956](#)

Change events are available for the object.

[AuthorizationFormConsentHistory on page 968](#)

History is available for tracked fields of the object.

[AuthorizationFormConsentShare on page 976](#)

Sharing is available for the object.

FinServ AuthorizationFormText Custom Fields

Represents an authorization form's text and language settings. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
IsActive__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description There can only be one Active Authorization Form Text at any given time with an Auth Form and locale combination. When a Consent Request is sent on a Data Use Purpose, all of the active authorization forms associated with the Data Use Purpose are selected, and all of the active authorization form text on the authorization forms is served to the person providing consent.</p>
IsReadOnly__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The form is read only and not editable. When you make an Authorization Form Text active at any point, IsReadOnly must be permanently false.</p>
LastActivationDateTime__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description You can sort the list of authorization texts based on their most recent activation date.</p>

Associated Objects

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

[AuthorizationFormTextFeed on page 960](#)

Feed tracking is available for the object.

[AuthorizationFormTextHistory on page 968](#)

History is available for tracked fields of the object.

FinServ_BillingStatement__c

Represents a billing statement for an individual's financial account.

Supported Calls

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

Fields

Field	Details
<code>BalanceTransfers__c</code>	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Balance transfer details.</p>
<code>BillingPeriodEnd__c</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Billing period end date.</p>
<code>BillingPeriodStart__c</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Billing period start date.</p>
<code>CashAdvances__c</code>	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cash advance amount for the billing period.</p>
<code>Deposits__c</code>	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Deposit made to the account during the billing period.</p>

Field	Details
EndingBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Balance due on the account during the billing period.</p>
FeesCharged__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee charged during the billing period.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Financial account associated with this billing statement.</p>
InsurancePolicy__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy associated with the billing statement</p>
InterestThisPeriod__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Interest charged on the account during the billing period.</p>
InterestYTD__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Interest charged year to date.</p>

Field	Details
LastPaymentDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last payment made on the account.</p>
MinimumPaymentDue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Minimum payment required by the due date.</p>
OtherCredits__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Other credits made during the billing period.</p>
PastDueAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount past due as of the statement date.</p>
PaymentDueDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date a payment is due.</p>
Payments__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Payment received since the last statement.</p>

Field	Details
PreviousBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Account balance at the end of the previous billing period.</p>
Purchases__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total purchases made during the current billing period.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
StatementDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the current statement was generated.</p>
Withdrawals__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cash withdrawal made during the billing period.</p>

FinServ_Card__c

Represents credit or debit card associated with this financial account.

Supported Calls

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

Fields

Field	Details
<code>AccountHolder__c</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Individual credit or debit holder associated with this card.</p>
<code>Active__c</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account is active (<code>true</code>) or inactive (<code>false</code>). Default is <code>true</code>.</p>
<code>BinNumber__c</code>	<p>Type double</p> <p>Properties CreateFilter, Nillable, SortUpdate</p> <p>Description Bank Identification number for this account.</p>
<code>FinancialAccount__c</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial account associated with this card.</p>
<code>OwnershipType__c</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of ownership for this card. Valid values:</p>

Field	Details
	<ul style="list-style-type: none"> Primary Authorized Other
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the financial account in an external data source.</p>
ValidUntil__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date card is no longer valid.</p>

FinServ_ChargesAndFees__c

Represents agreed-to fees and charges for servicing an individual's financial account.

Supported Calls

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

Fields

Field	Details
AnnualAccountCharge__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual fee for maintaining an account.</p>
AnnualMembershipFee__c	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual fee for credit card membership.</p>
APR__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual percentage rate.</p>
APRTYPE__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Annual percentage rate type. Valid values: <ul style="list-style-type: none"> Fixed Other Variable </p>
ATMFEE__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description ATM fee.</p>
BalanceTransferAPR__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description APR for balance transfers.</p>
CashAdvanceFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Fee for withdrawing cash from a credit card account.</p>
CashAPR__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual percentage rate applied to cash withdrawals.</p>
CashAPRTYPE__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description APR applied to cash borrowed from a credit card account. Valid values:</p> <ul style="list-style-type: none"> • Fixed • Other • Variable
ForeignTransactionFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for making a credit card purchase in a foreign currency.</p>
InsufficientFundsFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for attempting to make a purchase or payment from an account with insufficient funds.</p>
InterestRate__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Interest rate on a loan account (APR%).</p>

Field	Details
LatePaymentFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for not paying the minimum payment by the due date.</p>
MaximumTransactionFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for exceeding the maximum monthly transaction limit.</p>
MonthlyServiceFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Monthly account maintenance charge.</p>
OverdraftFees__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for a withdrawal that exceeds the available balance.</p>
ReplacementCardFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for debit or credit card replacement.</p>
ReturnedCheckFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for writing or receiving a check returned due to insufficient funds.</p>

Field	Details
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
StatementFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for mailing an account statement.</p>
StopPaymentFee__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Fee for requesting a stop payment on a check or payment that hasn't been processed yet.</p>

FinServ Contact Custom Fields

Represents information about an individual that pertains to their personhood, irrespective of their relationship with your firm, such as their birthdate or tax ID number. Custom fields extend the Contact object for use in Financial Services Cloud.

Fields

Field Name	Details
Affiliations__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Memberships in clubs, organizations, and alumni associations.</p>
Age__c	<p>Type double</p>

Field Name	Details
	Properties
	Filter, Nillable, Sort
	Description
	Age. Calculated from Contact.Birthdate.
AgeAsText__c	Type
	string
	Properties
	Filter, Nillable, Sort
	Description
	Age expressed in years, months, and days. Calculated from
	Contact.Birthdate. Label is Age Text .
AnnualIncome__c	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Annual income.
BillingAddress__c	Type
	string
	Properties
	Filter, Nillable, Sort
	Description
	The compound form of the billing address. Based on these address fields:
	Account.BillingStreet, Account.BillingCity,
	Account.BillingState, Account.BillingPostalCode, and
	Account.BillingCountry.
Citizenship__c	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Citizenship.
CommunicationPreferences__c	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Update

Field Name	Details
	<p>Description</p> <p>Preferred communication channel. Valid values:</p> <ul style="list-style-type: none"> • Balance Activities:Email • Balance Activities:Phone • Balance Activities:SMS • Fraud:Email • Fraud:Phone • Fraud:SMS • Promotions:Email • Promotions:Phone • Promotions:SMS
ContactPreference__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Preferred communication method.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Email • Mobile • Phone
CountryOfBirth__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description This individual's country of birth.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda

Field Name	Details
	<ul style="list-style-type: none">• Argentina• Armenia• Aruba• Australia• Austria• Azerbaijan• Bahamas• Bahrain• Bangladesh• Barbados• Belarus• Belgium• Belize• Benin• Bermuda• Bhutan• Bolivia, Plurinational State of• Bonaire, Sint Eustatius and Saba• Bosnia and Herzegovina• Botswana• Bouvet Island• Brazil• British Indian Ocean Territory• Brunei Darussalam• Bulgaria• Burkina Faso• Burundi• Cambodia• Cameroon• Canada• Cape Verde• Cayman Islands• Central African Republic• Chad• Chile• China• Christmas Island• Cocos (Keeling) Islands

Field Name	Details
	<ul style="list-style-type: none">• Colombia• Comoros• Congo• Congo, the Democratic Republic of the• Cook Islands• Costa Rica• Cote d'Ivoire• Croatia• Cuba• Curaçao• Cyprus• Czech Republic• Denmark• Djibouti• Dominica• Dominican Republic• Ecuador• Egypt• El Salvador• Equatorial Guinea• Eritrea• Estonia• Ethiopia• Falkland Islands (Malvinas)• Faroe Islands• Fiji• Finland• France• French Guiana• French Polynesia• French Southern Territories• Gabon• Gambia• Georgia• Germany• Ghana• Gibraltar• Greece

Field Name	Details
	<ul style="list-style-type: none">• Greenland• Grenada• Guadeloupe• Guatemala• Guernsey• Guinea• Guinea-Bissau• Guyana• Haiti• Heard Island and McDonald Islands• Holy See (Vatican City State)• Honduras• Hungary• Iceland• India• Indonesia• Iran, Islamic Republic of• Iraq• Ireland• Isle of Man• Israel• Italy• Jamaica• Japan• Jersey• Jordan• Kazakhstan• Kenya• Kiribati• Korea, Democratic People's Republic of• Korea, Republic of• Kuwait• Kyrgyzstan• Lao People's Democratic Republic• Latvia• Lebanon• Lesotho• Liberia

Field Name	Details
	<ul style="list-style-type: none">• Libyan Arab Jamahiriya• Liechtenstein• Lithuania• Luxembourg• Macao• Macedonia, the former Yugoslav Republic of• Madagascar• Malawi• Malaysia• Maldives• Mali• Malta• Martinique• Mauritania• Mauritius• Mayotte• Mexico• Moldova, Republic of• Monaco• Mongolia• Montenegro• Montserrat• Morocco• Mozambique• Myanmar• Namibia• Nauru• Nepal• Netherlands• New Caledonia• New Zealand• Nicaragua• Niger• Nigeria• Niue• Norfolk Island• Norway• Oman

Field Name	Details
	<ul style="list-style-type: none">• Pakistan• Palestine• Panama• Papua New Guinea• Paraguay• Peru• Philippines• Pitcairn• Poland• Portugal• Qatar• Reunion• Romania• Russian Federation• Rwanda• Saint Barthélemy• Saint Helena, Ascension and Tristan da Cunha• Saint Kitts and Nevis• Saint Lucia• Saint Martin (French part)• Saint Pierre and Miquelon• Saint Vincent and the Grenadines• Samoa• San Marino• Sao Tome and Principe• Saudi Arabia• Senegal• Serbia• Seychelles• Sierra Leone• Singapore• Sint Maarten (Dutch part)• Slovakia• Slovenia• Solomon Islands• Somalia• South Africa• South Georgia and the South Sandwich Islands

Field Name	Details
	<ul style="list-style-type: none">• South Sudan• Spain• Sri Lanka• Sudan• Suriname• Svalbard and Jan Mayen• Swaziland• Sweden• Switzerland• Syrian Arab Republic• Taiwan• Tajikistan• Tanzania, United Republic of• Thailand• Timor-Leste• Togo• Tokelau• Tonga• Trinidad and Tobago• Tunisia• Turkey• Turkmenistan• Turks and Caicos Islands• Tuvalu• Uganda• Ukraine• United Arab Emirates• United Kingdom• United States• Uruguay• Uzbekistan• Vanuatu• Venezuela, Bolivarian Republic of• Vietnam• Virgin Islands, British• Wallis and Futuna• Western Sahara• Yemen

Field Name	Details
	<ul style="list-style-type: none"> • Zambia • Zimbabwe
CountryOfResidence__c	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Country of primary residence.
CreatedFromLead__c	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether this individual was created from a converted lead (<code>true</code>) or not (<code>false</code>).
CurrentEmployer__c	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of current employer.
CustomerTimezone__c	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Primary time zone.
	Valid values:
	<ul style="list-style-type: none"> • Africa/Cairo • Africa/Johannesburg • Africa/Nairobi • America/Anchorage • America/Bogota • America/Buenos_Aires • America/Caracas • America/Chicago • America/Denver

Field Name	Details
	<ul style="list-style-type: none"> • America/El_Salvador • America/Halifax • America/Indianapolis • America/Lima • America/Los_Angeles • America/Mexico_City • America/New_York • America/Panama • America/Phoenix • America/Puerto_Rico • America/Santiago • America/Sao_Paulo • America/St_Johns • America/Tijuana • Asia/Baghdad • Asia/Bangkok • Asia/Calcutta • Asia/Colombo • Asia/Dacca • Asia/Dubai • Asia/Hong_Kong • Asia/Jakarta • Asia/Jerusalem • Asia/Kabul • Asia/Kamchatka • Asia/Karachi • Asia/Katmandu • Asia/Kuala_Lumpur • Asia/Kuwait • Asia/Manila • Asia/Rangoon • Asia/Riyadh • Asia/Saigon • Asia/Seoul • Asia/Shanghai • Asia/Singapore • Asia/Taipei • Asia/Tashkent

Field Name	Details
	<ul style="list-style-type: none"> • Asia/Tbilisi • Asia/Tehran • Asia/Tokyo • Asia/Yekaterinburg • Atlantic/Bermuda • Atlantic/Cape_Verde • Atlantic/South_Georgia • Australia/Adelaide • Australia/Brisbane • Australia/Darwin • Australia/Lord_Howe • Australia/Perth • Australia/Sydney • Europe/Amsterdam • Europe/Athens • Europe/Berlin • Europe/Bucharest • Europe/Brussels • Europe/Dublin • Europe/Helsinki • Europe/Istanbul • Europe/Lisbon • Europe/London • Europe/Minsk • Europe/Moscow • Europe/Paris • Europe/Prague • Europe/Rome • GMT • Pacific/Auckland • Pacific/Chatham • Pacific/Enderbury • Pacific/Fiji • Pacific/Guadalcanal • Pacific/Honolulu • Pacific/Kiritimati • Pacific/Niue • Pacific/Norfolk

Field Name	Details
	<ul style="list-style-type: none"> • Pacific/Pago_Pago • Pacific/Tongatapu
EmailVerified__c	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates that the individual's email address has been verified (<code>true</code>), or not (<code>false</code>).
EmployedSince__c	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Tenure with current employer.
Facebook__c	Type
	url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Facebook profile URL.
FaxVerified__c	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates that the individual's fax number has been verified (<code>true</code>), or not (<code>false</code>).
Gender__c	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Gender. Valid values:
	<ul style="list-style-type: none"> • Female • Male • Decline to Specify

Field Name	Details
HomeOwnership__c	<ul style="list-style-type: none"> Other
HomePhoneVerified__c	<p>Type boolean</p>
IndividualId__c	<p>Type string</p>
IndividualType__c	<p>Type picklist</p>
LanguagesSpoken__c	<p>Type string</p>

Properties
Create, Filter, Group, Nillable, Restricted picklist Sort, Update

Description
Relationship to primary residence.

Valid values:

- Rent
- Own
- Other

Properties
Create, Defaulted on create, Filter, Group, Sort, Update

Description
Indicates that the home phone number has been verified (true), or not (false).

Properties
Filter, Nillable, Sort

Description
Unique ID that relates this individual's contact record to its account record. Calculated from Account.IndividualId__c.

Properties
Create, Filter, Group, Nillable, Sort, Update

Description
Type of individual. Valid values:

- Individual

Properties
Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Languages spoken.
LastFourDigitSSN__c	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Last four digits of the individual's Social Security number. This field is encrypted.
LinkedIn__c	Type url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	LinkedIn profile URL.
MailingAddress__c	Type string
	Properties
	Filter, Nillable, Sort
	Description
	The compound form of the mailing address. Based on these address fields:
	MailingStreet, MailingCity, MailingState,
	MailingPostalCode, and MailingCountry.
MaritalStatus__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Marital status. Valid values:
	<ul style="list-style-type: none"> • Single • Married • Separated • Divorced • Widowed
MarketingOptOut__c	Type boolean

Field Name	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indication that the individual has opted out of receiving marketing materials. (<code>true</code>) or not (<code>false</code>).
MobileVerified__c	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates the mobile phone number has been verified (<code>true</code>), or not (<code>false</code>).
MostUsedChannel__c	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Most frequent communication channel.
	Valid values:
	<ul style="list-style-type: none"> • Mobile • Web • Branch • Call Center • Other
MotherMaidenName__c	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Maiden name of the individual's mother.
NextLifeEvent__c	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	<p>Next major life event.</p>
	<p>Valid values:</p>
	<ul style="list-style-type: none"> • Children • Critical Family Event • Enter Workforce • First Home Purchase • Higher Education • Moving • Promotion • Renovations • Retirement • Returning to Workforce
NumberOfChildren__c	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Number of children.
NumberOfDependents__c	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Number of dependents.
Occupation__c	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Occupation.
OtherAddress__c	Type
	string
	Properties
	Filter, Nillable, Sort

Field Name	Details
	Description
	<p>The compound form of the other address. Based on these address fields: OtherStreet, OtherCity, OtherState, OtherPostalCode, and OtherCountry.</p>
PreferredName__c	Type string
	Properties
	Create, Filter, Group, Nillable, Sort
	Description
	This individual's preferred name.
PrimaryAddressIsBilling__c	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the billing address is the primary address (<code>true</code>) or not (<code>false</code>).
PrimaryAddressIsMailing__c	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the mailing address is the primary address (<code>true</code>) or not (<code>false</code>).
PrimaryAddressIsOther__c	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the other address is the primary address (<code>true</code>) or not (<code>false</code>).
PrimaryAddressIsShipping__c	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the shipping address is the primary address (<code>true</code>) or not (<code>false</code>).

Field Name	Details
PrimaryCitizenship__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Country of primary citizenship.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil

Field Name	Details
	<ul style="list-style-type: none">• British Indian Ocean Territory• Brunei Darussalam• Bulgaria• Burkina Faso• Burundi• Cambodia• Cameroon• Canada• Cape Verde• Cayman Islands• Central African Republic• Chad• Chile• China• Christmas Island• Cocos (Keeling) Islands• Colombia• Comoros• Congo• Congo, the Democratic Republic of the• Cook Islands• Costa Rica• Cote d'Ivoire• Croatia• Cuba• Curaçao• Cyprus• Czech Republic• Denmark• Djibouti• Dominica• Dominican Republic• Ecuador• Egypt• El Salvador• Equatorial Guinea• Eritrea• Estonia

Field Name	Details
	<ul style="list-style-type: none">• Ethiopia• Falkland Islands (Malvinas)• Faroe Islands• Fiji• Finland• France• French Guiana• French Polynesia• French Southern Territories• Gabon• Gambia• Georgia• Germany• Ghana• Gibraltar• Greece• Greenland• Grenada• Guadeloupe• Guatemala• Guernsey• Guinea• Guinea-Bissau• Guyana• Haiti• Heard Island and McDonald Islands• Holy See (Vatican City State)• Honduras• Hungary• Iceland• India• Indonesia• Iran, Islamic Republic of• Iraq• Ireland• Isle of Man• Israel• Italy

Field Name	Details
	<ul style="list-style-type: none">• Jamaica• Japan• Jersey• Jordan• Kazakhstan• Kenya• Kiribati• Korea, Democratic People's Republic of• Korea, Republic of• Kuwait• Kyrgyzstan• Lao People's Democratic Republic• Latvia• Lebanon• Lesotho• Liberia• Libyan Arab Jamahiriya• Liechtenstein• Lithuania• Luxembourg• Macao• Macedonia, the former Yugoslav Republic of• Madagascar• Malawi• Malaysia• Maldives• Mali• Malta• Martinique• Mauritania• Mauritius• Mayotte• Mexico• Moldova, Republic of• Monaco• Mongolia• Montenegro• Montserrat

Field Name	Details
	<ul style="list-style-type: none">• Morocco• Mozambique• Myanmar• Namibia• Nauru• Nepal• Netherlands• New Caledonia• New Zealand• Nicaragua• Niger• Nigeria• Niue• Norfolk Island• Norway• Oman• Pakistan• Palestine• Panama• Papua New Guinea• Paraguay• Peru• Philippines• Pitcairn• Poland• Portugal• Qatar• Reunion• Romania• Russian Federation• Rwanda• Saint Barthélemy• Saint Helena, Ascension and Tristan da Cunha• Saint Kitts and Nevis• Saint Lucia• Saint Martin (French part)• Saint Pierre and Miquelon• Saint Vincent and the Grenadines

Field Name	Details
	<ul style="list-style-type: none">• Samoa• San Marino• Sao Tome and Principe• Saudi Arabia• Senegal• Serbia• Seychelles• Sierra Leone• Singapore• Sint Maarten (Dutch part)• Slovakia• Slovenia• Solomon Islands• Somalia• South Africa• South Georgia and the South Sandwich Islands• South Sudan• Spain• Sri Lanka• Sudan• Suriname• Svalbard and Jan Mayen• Swaziland• Sweden• Switzerland• Syrian Arab Republic• Taiwan• Tajikistan• Tanzania, United Republic of• Thailand• Timor-Leste• Togo• Tokelau• Tonga• Trinidad and Tobago• Tunisia• Turkey• Turkmenistan

Field Name	Details
	<ul style="list-style-type: none"> • Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
PrimaryLanguage__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description This individual's primary language.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese

Field Name	Details
	<ul style="list-style-type: none">• Basque• Betawi• Bosnian• Breton• Bulgarian• Cantonese• Catalan• Cherokee• Chickasaw• Chinese• Coptic• Cornish• Corsican• Crimean Tatar• Croatian• Czech• Danish• Dawro• Dutch• English• Esperanto• Estonian• Ewe• Fiji Hindi• Filipino• Finnish• French• Galician• Georgian• German• Greek, Modern• Greenlandic• Haitian Creole• Hawaiian• Hebrew• Hindi• Hungarian• Icelandic

Field Name	Details
	<ul style="list-style-type: none">IndonesianInuktitutIrish (Gaelic)ItalianJapaneseJavaneseKabardianKalashaKannadaKashubianKhmerKinyarwandaKoreanKurdish/KurdîLadinLatgalianLatinLingalaLivonianLojbanLow GermanLower SorbianMacedonianMalayMalayalamMandarinManxMaoriMauritian CreoleMin NanMongolianNorwegianOriyaPangasinanPapiamentuPashtoPersianPitjantjatjara

Field Name	Details
	<ul style="list-style-type: none">• Polish• Portuguese• Quenya• Rapa Nui• Romanian• Russian• Scots• Scottish Gaelic• Serbian• Serbo-Croatian• Sinhalese• Slovak• Slovene• Spanish• Swahili• Swedish• Tagalog• Tajik• Tamil• Tarantino• Telugu• Thai• Tok Pisin• Turkish• Twi• Ukrainian• Upper Sorbian• Urdu• Uzbek• Venetian• Vietnamese• Vilamovian• Vôrro• Welsh• Xhosa• Yiddish• Zazaki

Field Name	Details
ReferredByContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description External contact referring this individual.</p>
ReferredByUser__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Internal Salesforce user who made the referral.</p>
ReferrerScore__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description A value of 0 to 100. A high score reflects a high rate of referral conversion.</p>
SecondaryCitizenship__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Country of secondary citizenship.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba

Field Name	Details
	<ul style="list-style-type: none">• Australia• Austria• Azerbaijan• Bahamas• Bahrain• Bangladesh• Barbados• Belarus• Belgium• Belize• Benin• Bermuda• Bhutan• Bolivia, Plurinational State of• Bonaire, Sint Eustatius and Saba• Bosnia and Herzegovina• Botswana• Bouvet Island• Brazil• British Indian Ocean Territory• Brunei Darussalam• Bulgaria• Burkina Faso• Burundi• Cambodia• Cameroon• Canada• Cape Verde• Cayman Islands• Central African Republic• Chad• Chile• China• Christmas Island• Cocos (Keeling) Islands• Colombia• Comoros• Congo

Field Name	Details
	<ul style="list-style-type: none">• Congo, the Democratic Republic of the• Cook Islands• Costa Rica• Cote d'Ivoire• Croatia• Cuba• Curaçao• Cyprus• Czech Republic• Denmark• Djibouti• Dominica• Dominican Republic• Ecuador• Egypt• El Salvador• Equatorial Guinea• Eritrea• Estonia• Ethiopia• Falkland Islands (Malvinas)• Faroe Islands• Fiji• Finland• France• French Guiana• French Polynesia• French Southern Territories• Gabon• Gambia• Georgia• Germany• Ghana• Gibraltar• Greece• Greenland• Grenada• Guadeloupe

Field Name	Details
	<ul style="list-style-type: none">• Guatemala• Guernsey• Guinea• Guinea-Bissau• Guyana• Haiti• Heard Island and McDonald Islands• Holy See (Vatican City State)• Honduras• Hungary• Iceland• India• Indonesia• Iran, Islamic Republic of• Iraq• Ireland• Isle of Man• Israel• Italy• Jamaica• Japan• Jersey• Jordan• Kazakhstan• Kenya• Kiribati• Korea, Democratic People's Republic of• Korea, Republic of• Kuwait• Kyrgyzstan• Lao People's Democratic Republic• Latvia• Lebanon• Lesotho• Liberia• Libyan Arab Jamahiriya• Liechtenstein• Lithuania

Field Name	Details
	<ul style="list-style-type: none">• Luxembourg• Macao• Macedonia, the former Yugoslav Republic of• Madagascar• Malawi• Malaysia• Maldives• Mali• Malta• Martinique• Mauritania• Mauritius• Mayotte• Mexico• Moldova, Republic of• Monaco• Mongolia• Montenegro•Montserrat• Morocco• Mozambique• Myanmar• Namibia• Nauru• Nepal• Netherlands• New Caledonia• New Zealand• Nicaragua• Niger• Nigeria• Niue• Norfolk Island• Norway• Oman• Pakistan• Palestine• Panama

Field Name	Details
	<ul style="list-style-type: none">• Papua New Guinea• Paraguay• Peru• Philippines• Pitcairn• Poland• Portugal• Qatar• Reunion• Romania• Russian Federation• Rwanda• Saint Barthélemy• Saint Helena, Ascension and Tristan da Cunha• Saint Kitts and Nevis• Saint Lucia• Saint Martin (French part)• Saint Pierre and Miquelon• Saint Vincent and the Grenadines• Samoa• San Marino• Sao Tome and Principe• Saudi Arabia• Senegal• Serbia• Seychelles• Sierra Leone• Singapore• Sint Maarten (Dutch part)• Slovakia• Slovenia• Solomon Islands• Somalia• South Africa• South Georgia and the South Sandwich Islands• South Sudan• Spain• Sri Lanka

Field Name	Details
	<ul style="list-style-type: none">• Sudan• Suriname• Svalbard and Jan Mayen• Swaziland• Sweden• Switzerland• Syrian Arab Republic• Taiwan• Tajikistan• Tanzania, United Republic of• Thailand• Timor-Leste• Togo• Tokelau• Tonga• Trinidad and Tobago• Tunisia• Turkey• Turkmenistan• Turks and Caicos Islands• Tuvalu• Uganda• Ukraine• United Arab Emirates• United Kingdom• United States• Uruguay• Uzbekistan• Vanuatu• Venezuela, Bolivarian Republic of• Vietnam• Virgin Islands, British• Wallis and Futuna• Western Sahara• Yemen• Zambia• Zimbabwe

Field Name	Details
SecondaryLanguage__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description This individual's secondary language.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese • Basque • Betawi • Bosnian • Breton • Bulgarian • Cantonese • Catalan • Cherokee • Chickasaw • Chinese • Coptic • Cornish • Corsican • Crimean Tatar • Croatian • Czech • Danish • Dawro

Field Name	Details
	<ul style="list-style-type: none">• Dutch• English• Esperanto• Estonian• Ewe• Fiji Hindi• Filipino• Finnish• French• Galician• Georgian• German• Greek, Modern• Greenlandic• Haitian Creole• Hawaiian• Hebrew• Hindi• Hungarian• Icelandic• Indonesian• Inuktitut• Irish (Gaelic)• Italian• Japanese• Javanese• Kabardian• Kalasha• Kannada• Kashubian• Khmer• Kinyarwanda• Korean• Kurdish/Kurdî• Ladin• Latgalian• Latin• Lingala

Field Name	Details
	<ul style="list-style-type: none">• Livonian• Lojban• Low German• Lower Sorbian• Macedonian• Malay• Malayalam• Mandarin• Manx• Maori• Mauritian Creole• Min Nan• Mongolian• Norwegian• Oriya• Pangasinan• Papiamentu• Pashto• Persian• Pitjantjatjara• Polish• Portuguese• Quenya• Rapa Nui• Romanian• Russian• Scots• Scottish Gaelic• Serbian• Serbo-Croatian• Sinhalese• Slovak• Slovene• Spanish• Swahili• Swedish• Tagalog• Tajik

Field Name	Details
	<ul style="list-style-type: none"> • Tamil • Tarantino • Telugu • Thai • Tok Pisin • Turkish • Twi • Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Võrro • Welsh • Xhosa • Yiddish • Zazaki
ShippingAddress__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The compound form of the shipping address. Based on these address fields: Account.ShippingStreet, Account.ShippingCity, Account.ShippingState, Account.ShippingPostalCode, and Account.ShippingCountry.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies this individual in an external data source.</p>
TaxBracket__c	<p>Type picklist</p>

Field Name	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Rate at which this individual is taxed. Valid values:</p>
	<ul style="list-style-type: none"> • 10% • 15% • 25% • 28% • 33% • 35%
TaxId__c	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Tax Identification Number or Social Security number.</p>
Twitter__c	<p>Type url</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Twitter profile URL.</p>
WeddingAnniversary__c	<p>Type date</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Date of wedding anniversary.</p>

FinServ_ContactContactRelation__c

Represents the relationship between any two individuals.

Supported Calls

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

Fields

 **Note:** To avoid DML errors on insert, read-only access at minimum is required for all fields that have a default value.

Field	Details
Active__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the relationship is active (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p>
Contact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contact that <code>RelatedContact__c</code> is related from.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship ended.</p>
ExternalId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
InverseRelationship__c	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between Contact and RelatedContact__c so that it can be referenced by a trigger that creates the inverse relationship record.</p>
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-number identifier for the relationship. Label is Contact Relation Name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record.</p>
RelatedContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contact that Contact__c is related to.</p>
Role__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Role that describes how RelatedContact__c is related to Contact__c</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>

Field	Details
StartDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship started.</p>

FinServ_Education__c

Represents an individual's educational background.

Supported Calls

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

Fields

Field	Details
Contact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The individual's contact record.</p>
EducationLevel__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Level of education. Valid values:</p> <ul style="list-style-type: none"> • Declined to Comment • Graduate • High School • Post Graduate
GraduationDate__c	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of graduation from the corresponding education level.</p>
Institution__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the educational institution that awarded the degree.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>

FinServ_Employment__c

Represents information about an individual's employment history.

Supported Calls

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

Fields

Field	Details
AnnualIncome__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Gross annual income as reported on the most recent tax return.</p>

Field	Details
Contact__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The individual's contact record.
EmployerAddress__c	Type textarea
	Properties Create, Nillable, Update
	Description Address of the individual's employer.
EmployerPhoneNumber__c	Type phone
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Phone number of the employer.
EmploymentStatus__c	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Nillable, Sort, Update
	Description Employment status. Valid values: <ul style="list-style-type: none"> • Employed • Self-Employed • Homemaker • Retired • Student • Unemployed with Income • Unemployed Without Income
EndDate__c	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description End date at former employer.

Field	Details
LengthOfEmployment__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Length of employment in years (to two decimal places).</p>
Occupation__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Nillable, Sort, Update</p> <p>Description Job category. Valid values:</p> <ul style="list-style-type: none"> Architecture and Engineering Arts, Design, Entertainment, Sports, and Media Building and Grounds Cleaning or Maintenance Community and Social Service Computer and Mathematical Construction and Extraction Education, Training, and Library Farming, Fishing, and Forestry Food Preparation and Serving Healthcare Practitioners and Technical Healthcare Support Installation, Maintenance, and Repair Legal Life, Physical, and Social Science Management Office Admin Other Personal Care and Service Production Protective Service Sales Transportation and Material Moving
Position__c	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Job title.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the individual began working for current employer.</p>

Event Custom Fields

Represents an event associated with a client. Custom fields extend the standard Event object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client expectations that this event relates to.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the household associated with the client.</p>

Field Name	Details
NextSteps__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Next steps for this client event.</p>
Objectives__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client objectives that this event relates to.</p>
Regarding__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The nature of the most recent interaction. Valid values:</p> <ul style="list-style-type: none"> • Prospecting • Onboarding • Client Retention • Service

FinServ_FinancialAccountRole__c

Represents the role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.

Supported Calls

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

Fields

Field	Details
Active__c	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the organizational entity or person currently occupies this role (<code>true</code>) or not (<code>false</code>).</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Editable__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this field is editable (<code>true</code>) or not (<code>false</code>).</p>
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description End date when the organizational entity or person relinquished this role.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Financial account that this role is related to.</p>
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the financial account role.</p>

Field	Details
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this financial account role.</p>
RelatedAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the organizational entity that is involved with the financial account.</p>
RelatedContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the person who is involved with the financial account.</p>
Role__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Role that describes how the organizational entity or person is involved with the financial account.</p> <p>Don't manually update the role to either primary owner or secondary owner, because these roles are automatically assigned based on the primary owner and joint owner of the corresponding financial account record.</p> <p>Valid values:</p> <p>When the record type is set to Account Role:</p> <ul style="list-style-type: none"> • Accountant • Additional Owner • Administrator • Advisor • Annuitant • Appoint / Remove Authority • Authorized Agent

Field	Details
	<ul style="list-style-type: none"> • Authorized Agent / Beneficial Owner • Authorized Individual • Authorized Signer • Beneficiary • Business Manager • Committee Member • Conservator • Control Person • Corporation • Custodian • Deceased Grantor • Decedent • Discretionary • Foundation • Full Authority • Grantor • Guardian • Insured • Interested Party • Minor Primary Owner • Original Depositor • Other • Power of Attorney • Proprietor • TOD Beneficiary • Trustee • Primary Owner • Joint Owner
SourceSystemId__c	<p>When the record type is set to Contact Role:</p> <ul style="list-style-type: none"> • Accountant • Beneficial Owner • Beneficiary • Business Manager • Grantor • Trustee

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the role in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Start date when the organizational entity or person assumed this role. The default value is the current date.</p>

FinServ_FinancialAccount__c

Represents a financial account such as an investment account, bank account, or insurance policy.

Supported Calls

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

Fields

Field	Details
AccrualFrequency__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The frequency the interest is accrued on the financial account. Possible values are:<ul style="list-style-type: none">• Annual• Daily• Monthly• QuarterlyThe default value is Daily.</p>

Field	Details
AccruedInterest__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The interest accrued on the financial account in the current statement period.</p>
Address1__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Street address line 1 for mailing address.</p>
Address2__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Street address line 2 for mailing address.</p>
ApplicationDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when this individual submitted the financial account application.</p>
APY__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual percentage yield. (Can be fractional.)</p>
AssetRebalance__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Sort, Update</p>

Field	Details
	<p>Description Indicates whether automatic portfolio rebalancing applies to this financial account (<code>true</code>) or not (<code>false</code>).</p>
AvailableCredit__c	<p>Type currency</p> <p>Properties Create, , Filter, Nillable, Sort, Update</p> <p>Description Total current available credit for this financial account.</p>
AverageBalance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Average amount of money in the financial account, over a time period.</p>
Balance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Amount of money in the financial account.</p>
BalanceLastStatement__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Account balance posted on last statement.</p>
BookedDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date charge or credit booked to account.</p>
BranchCode__c	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The branch code of the financial account.</p>
BranchName__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The branch name of the financial account.</p>
CashBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cash available in the financial account.</p>
CashLimit__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Maximum cash withdrawal or advance amount.</p>
City__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description City for mailing address.</p>
CloseDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when this financial account was closed.</p>
CollateralDesc__c	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of collateral provided for loan.</p>
Country__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Country for mailing address.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
CurrentPostedBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current posted balance in account.</p>
DailyWithdrawalLimit__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount that can be withdrawn in one day.</p>
Description__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the financial account.</p>

Field	Details
Discretionary__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the advisor has discretionary trading authority for this financial account (<code>true</code>) or not (<code>false</code>).</p>
DrawPeriodMonths__c	<p>Type double</p> <p>Properties CreateFilter, Nillable, SortUpdate</p> <p>Description Number of months an individual can withdraw funds from a credit account.</p>
EscrowBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current balance in escrow account.</p>
ExpectedCloseDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Expected date when the debit account or loan closes.</p>
FinancialAccountChargesAndFees__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to Charges and Fees record for the account.</p>
FinancialAccountNumber__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description ID that uniquely identifies the financial account in an external data source. Label is <code>Account Number</code>.</p>
<code>FinancialAccountSource__c</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Data source. Label is <code>Source</code>. Valid values:</p> <ul style="list-style-type: none"> • Integrator • Manual Entry • Pending
<code>FinancialAccountType__c</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of financial account. Label is <code>Type</code>. Valid values:</p> <ul style="list-style-type: none"> • 401(a) • 401(k) • 403(b) • 529 Plan • Brokerage • Cash Management Account • CD • Checking • Credit Card • Discount Brokerage • Fixed Annuity • Individual Life • IRA • Mutual Fund • Profit Sharing • Rollover IRA • Roth IRA • Savings • Term Life

Field	Details
	<ul style="list-style-type: none"> Variable Life Whole Life
HardwareSerial__c	Type string
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The serial number of hardware associated with the account.
HeldAway__c	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether this financial account is managed or administered externally (true) or in-house (false).
HoldingCount__c	Type double
	Properties
	Filter, Nillable, Sort
	Description
	Number of holdings within this financial account. Calculated by roll-up summary. Label is Number of Holdings.
Household__c	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Household that this financial account rolls up to.
IncomingVolume__c	Type double
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The volume of transactions coming in through the service.
InsurancePaidYearToDate__c	Type currency

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of insurance paid in the current tax year.</p>
InsuredAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The insured value that an insurance policy covers.</p>
InterestBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The interest balance on the financial account.</p>
InterestPaidYearToDate__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of interest paid in the current tax year.</p>
InsurancePolicy__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy associated with this financial account.</p>
InterestRate__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Interest rate as a percent.</p>
InvestmentObjectives__c	<p>Type multipicklist</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Update</p>
	<p>Description Purpose of this financial account. Valid values:</p> <ul style="list-style-type: none"> • Safety • Income • Growth • Tax Optimization • Liquidity
JointOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Joint owner of this financial account.</p>
LastActivityDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Timestamp for when this financial account last had a task or event action associated with the record.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastTransactionDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for the last transaction on the account.</p>
LastUpdated__c	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when data for the financial account was last updated by an external data source.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
LienHolder__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of lien holder on the financial account.</p>
LoanAmount__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Amount of the loan.</p>
LoanEndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description End date for the loan.</p>
LoanTermMonths__c	<p>Type double</p> <p>Properties CreateFilter, Nillable, SortUpdate</p> <p>Description Loan term in months.</p>

Field	Details
Managed__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this financial account is managed or administered (<code>true</code>), or not (<code>false</code>).</p>
MinimumBalance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Minimum balance requirement for this financial account.</p>
MinimumPayment__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Minimum monthly payment on account.</p>
ModelPortfolio__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Model asset allocation for the financial account. Valid values:</p> <ul style="list-style-type: none"> • Conservative • Moderate • Balanced • Growth • Aggressive
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of the financial account.</p>

Field	Details
<code>NickName__c</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Nickname of the financial account.</p>
<code>OpenDate__c</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the financial account was opened.</p>
<code>OutgoingVolume__c</code>	<p>Type double</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The volume of transactions going out through the service.</p>
<code>OverDraftAllowed__c</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the financial account allows an overdraft (<code>true</code>) or not (<code>false</code>).</p>
<code>OverDraftLinkedAccount__c</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Reference to the linked overdraft account.</p>
<code>OverdraftProtection__c</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the customer accepts overdraft protection and its associated fees.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the financial account record.</p>
Ownership__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of ownership for the account. Valid values:</p> <ul style="list-style-type: none"> • Individual • Joint • Trust
OwnerType__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Individual's ownership role (primary or joint) for the account.</p>
PaperlessDelivery__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Account owner elects to receive electronic delivery of financial account documents (<code>true</code>) or not (<code>false</code>).</p>
PaymentAmount__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Minimum monthly payment on account.</p>
PaymentDueDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when payment due on the account.</p>
PaymentFrequency__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Frequency of payments on the account. Valid values:</p> <ul style="list-style-type: none"> • Weekly • Biweekly • Monthly • Quarterly • Semiannually • Annually
PendingDeposits__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Deposits pending on the account.</p>
PendingWithdrawals__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Withdrawals pending on the account.</p>
Performance1Yr__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Performance measured over the past year.</p>
Performance3Yr__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Performance measured over the past three years.</p>
PerformanceMTD__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Performance measured over the past month-to-date.</p>
PerformanceQTD__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Performance measured over the past quarter-to-date.</p>
PerformanceYTD__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Performance measured over the past calendar year-to-date.</p>
PolicyTerm__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The period of coverage provided by the policy.</p>
PostalCode__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Postal code for mailing address.</p>
Premium__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount paid to the insurer for insurance policy coverage.</p>
PrimaryBankerIdentifier__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the primary banker who manages the financial account.</p>
PrimaryBankerName__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the primary banker who manages the financial account.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of the financial account.</p>
PrincipalBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Principal balance on the loan account.</p>
PrincipalPaidYearToDate__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description The total amount paid against the principal in the current tax year.
ProductName__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Policy product name.
PropTaxPaidYearToDate__c	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The total amount of property tax paid in the current tax year.
RebalanceFrequency__c	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Frequency of portfolio rebalancing for this financial account. Valid values:
	<ul style="list-style-type: none"> • Monthly • Quarterly • Semiannually • Annually
RecordTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the record type associated with this financial account.
RecordTypeName__c	Type string
	Properties Filter, Nillable, Sort

Field	Details
	<p>Description Record type for this financial account. The value is copied from <code>RecordType.Name</code> and can't be changed. Label is <code>Record Type</code>.</p>
RenewalDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when insurance policy renewal is due.</p>
RepaymentPeriodMonths__c	<p>Type double</p> <p>Properties CreateFilter, Nillable, SortUpdate</p> <p>Description Repayment period in months.</p>
RoutingNumber__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Bank routing number.</p>
SecondaryBankerIdentifier__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the secondary banker who manages the financial account.</p>
SecondaryBankerName__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the secondary banker who manages the financial account.</p>
ServiceProvider__c	<p>Type string</p>

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Custodian or recordkeeper of this financial account.
ServiceType__c	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The type of service undertaken.
SourceSystemId__c	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	ID that uniquely identifies the financial account in an external data source.
State__c	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	State for mailing address.
StatementFrequency__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Frequency statements are issued. Valid values:
	<ul style="list-style-type: none"> • Monthly • Biweekly • Quarterly • Annually
Status__c	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description Status of this financial account. Valid values:</p> <ul style="list-style-type: none"> • Open • Closed • On Hold • Pending
TargetLimit__c	<p>Type double</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The limit on items or value that the service processes.</p>
TaxID__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Tax Identification Number associated with this financial account.</p>
TaxStatus__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of tax treatment this financial account qualifies for. Valid values:</p> <ul style="list-style-type: none"> • Nonqualified • Qualified
TermDepositMaturityDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date a fixed term deposit matures.</p>
TimeHorizon__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Investment time frame for this financial account. Valid values:</p> <ul style="list-style-type: none"> • Long Term • Medium Term • Short Term
TotalCreditLimit__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total credit limit.</p>
TotalHoldAmountAsOfDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the total hold amount is relevant.</p>
TotalHoldAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total hold amount on the financial account.</p>
Type__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of account. Valid values:</p> <ul style="list-style-type: none"> • Brokerage • Discount Brokerage • CD • Checking • Cash Management Account • Credit Card • Savings

Field	Details
	<ul style="list-style-type: none"> • Mutual Fund, Fixed Annuity • Variable Annuity • Managed Account • Individual Life • Term Life • Variable Life • Whole Life

FinServ_FinancialAccountTransaction__c

Represents information about a single financial account transaction.

Supported Calls

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

Fields

Field	Details
AllocatedEscrowPayment__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of the payment that's allocated towards escrow.</p>
AllocatedFeeAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of the payment that's allocated towards fees.</p>
AllocatedInterestAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The amount of the payment that's allocated towards the interest.
AllocatedPrincipalAmount__c	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount of the payment that's allocated towards the principal.
Amount__c	Type currency
	Properties
	Create, Filter, Sort, Update
	Description
	Amount of the transaction.
BillingStatement__c	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Billing statement record associated with the account.
CardAccountID__c	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Card number linked to the transaction.
Claim__c	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The claim associated with the financial account transaction.
Description__c	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description Description of the transaction.</p>
DisputeReason__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Reason for the dispute. Possible values are:</p> <ul style="list-style-type: none"> • Duplicate Transactions • Others • Suspected Fraud • Transaction not recognized
EscrowBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The balance on the escrow amount of the financial account.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial account to which the transaction pertains.</p>
InsurancePolicy__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The insurance policy associated with the financial account transaction.</p>
MerchantCategoryCode__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Merchant category code.</p>
PostDate__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date the transaction posted to the account.</p>
PrincipalBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The balance on the principal amount of the financial account.</p>
RunningBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Running balance for the transaction.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Record ID from an external data source.</p>
SourceTransactionType__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Source transaction type from an external data source.</p>
TransactionDate__c	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description Date of the transaction.</p>
TransactionId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the transaction in an external data source.</p>
TransactionStatus__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Nillable, Sort, Update</p> <p>Description Status of the transaction.</p> <ul style="list-style-type: none"> • Pending • Posted
TransactionType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of transaction.</p> <ul style="list-style-type: none"> • Credit • Debit

FinServ_FinancialGoal__c

This Financial Goal object is installed in your Financial Services Cloud Salesforce org when you install the Financial Services Cloud Managed Package. It represents a client's financial goal, such as college funds or a major purchase.

Supported Calls

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

Fields

Field	Details
ActualValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current amount saved toward goal.</p>
CompletionDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the goal was reached.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Description__c	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the goal.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Household that this goal is associated with.</p>
InitialValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Starting amount saved toward goal.</p>
LastActivityDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Timestamp for when this goal last had a task or event action associated with the record.</p>
LastReferencedDate	<p>Type date</p> <p>Properties Filter, Nillable, Sort,</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this goal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the financial goal record.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Primary owner of this goal.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the goal in an external data source.</p>
Status__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of goal. Valid values: <ul style="list-style-type: none"> Completed In Progress Not Started </p>
TargetDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the goal is expected to be reached.</p>
TargetValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount required for the goal.</p>
Type__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Purpose of goal. Valid values: <ul style="list-style-type: none"> Education </p>

Field	Details
	<ul style="list-style-type: none"> • Home Purchase • Other • Retirement

FinServ_FinancialHolding__c

Represents a financial holding in an investment account, such as shares of stock.

Supported Calls

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

Fields

Field	Details
AssetCategory__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Subcategory of asset type. Valid values:</p> <ul style="list-style-type: none"> • U.S. Equity • Sector Equity • Allocation • International Equity • Alternative • Commodities • Taxable Bond • Municipal Bond
AssetCategoryName__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Market capitalization and investing style. Valid values:</p> <ul style="list-style-type: none"> • Large Growth

Field	Details
	<ul style="list-style-type: none"> • Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth • Mid-Cap Value • Mid-Cap Blend
AssetClass__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Major category of asset type. Valid values:</p> <ul style="list-style-type: none"> • Equities • Fixed Income • Cash Equivalents • Alternative Investments
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Financial account that this holding is related to.</p>
GainLoss__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Change in value since purchase.</p>

Field	Details
Household__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Household that this holding rolls up to.
LastActivityDate	Type date
	Properties Filter, Group, Nillable, Sort
	Description Timestamp for when this financial holding last had a task or event action associated with the record.
LastReferencedDate	Type date
	Properties Filter, Nillable, Sort,
	Description Timestamp for when the current user last viewed a record related to this record.
LastUpdated__c	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Timestamp for when data for this holding was last updated by an external data source.
LastViewedDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Timestamp for when the current user last viewed this record.
MarketValue__c	Type currency
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	<p>Description Current market value.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this holding.</p>
PercentChange__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Percent change in value since purchase.</p>
Price__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current price per share.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this holding.</p>
PurchasePrice__c	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Price per-share at time of purchase.</p>
Securities__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Name of the securities held. Label is <code>Symbol</code>.</p>
<code>Shares__c</code>	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Number of shares held.</p>
<code>SourceSystemId__c</code>	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies the holding in an external data source.</p>
<code>Symbol__c</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Ticker symbol for the securities held. The value is copied from <code>Securities__c</code> and can't be changed.</p>

FinServ_IdentificationDocument__c

Represents information about documents used to verify an individual's identity.

Supported Calls

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

Fields

Field	Details
<code>Account__c</code>	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the identification document.</p>
DocumentNumber__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Number listed on the identification document.</p>
DocumentType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Type of document used to verify the person's identity. Valid values: <ul style="list-style-type: none"> • Green Card • License • Other • Passport • Visa </p>
ExpirationDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the document expires.</p>
IssueDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the document was issued.</p>
IssuingCountry__c	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description The country in which the document was issued. Valid values:</p> <ul style="list-style-type: none">• Afghanistan• Aland Islands• Albania• Algeria• Andorra• Angola• Anguilla• Antarctica• Antigua and Barbuda• Argentina• Armenia• Aruba• Australia• Austria• Azerbaijan• Bahamas• Bahrain• Bangladesh• Barbados• Belarus• Belgium• Belize• Benin• Bermuda• Bhutan• Bolivia, Plurinational State of• Bonaire, Sint Eustatius and Saba• Bosnia and Herzegovina• Botswana• Bouvet Island• Brazil• British Indian Ocean Territory• Brunei Darussalam• Bulgaria

Field	Details
	<ul style="list-style-type: none">• Burkina Faso• Burundi• Cambodia• Cameroon• Canada• Cape Verde• Cayman Islands• Central African Republic• Chad• Chile• China• Christmas Island• Cocos (Keeling) Islands• Colombia• Comoros• Congo• Congo, the Democratic Republic of the• Cook Islands• Costa Rica• Cote d'Ivoire• Croatia• Cuba• Curaçao• Cyprus• Czech Republic• Denmark• Djibouti• Dominica• Dominican Republic• Ecuador• Egypt• El Salvador• Equatorial Guinea• Eritrea• Estonia• Ethiopia• Falkland Islands (Malvinas)• Faroe Islands

Field	Details
	<ul style="list-style-type: none">• Fiji• Finland• France• French Guiana• French Polynesia• French Southern Territories• Gabon• Gambia• Georgia• Germany• Ghana• Gibraltar• Greece• Greenland• Grenada• Guadeloupe• Guatemala• Guernsey• Guinea• Guinea-Bissau• Guyana• Haiti• Heard Island and McDonald Islands• Holy See (Vatican City State)• Honduras• Hungary• Iceland• India• Indonesia• Iran, Islamic Republic of• Iraq• Ireland• Isle of Man• Israel• Italy• Jamaica• Japan• Jersey

Field	Details
	<ul style="list-style-type: none">• Jordan• Kazakhstan• Kenya• Kiribati• Korea, Democratic People's Republic of• Korea, Republic of• Kuwait• Kyrgyzstan• Lao People's Democratic Republic• Latvia• Lebanon• Lesotho• Liberia• Libyan Arab Jamahiriya• Liechtenstein• Lithuania• Luxembourg• Macao• Macedonia, the former Yugoslav Republic of• Madagascar• Malawi• Malaysia• Maldives• Mali• Malta• Martinique• Mauritania• Mauritius• Mayotte• Mexico• Moldova, Republic of• Monaco• Mongolia• Montenegro•Montserrat• Morocco• Mozambique• Myanmar

Field	Details
	<ul style="list-style-type: none">• Namibia• Nauru• Nepal• Netherlands• New Caledonia• New Zealand• Nicaragua• Niger• Nigeria• Niue• Norfolk Island• Norway• Oman• Pakistan• Palestine• Panama• Papua New Guinea• Paraguay• Peru• Philippines• Pitcairn• Poland• Portugal• Qatar• Reunion• Romania• Russian Federation• Rwanda• Saint Barthélemy• Saint Helena, Ascension and Tristan da Cunha• Saint Kitts and Nevis• Saint Lucia• Saint Martin (French part)• Saint Pierre and Miquelon• Saint Vincent and the Grenadines• Samoa• San Marino• Sao Tome and Principe

Field	Details
	<ul style="list-style-type: none">• Saudi Arabia• Senegal• Serbia• Seychelles• Sierra Leone• Singapore• Sint Maarten (Dutch part)• Slovakia• Slovenia• Solomon Islands• Somalia• South Africa• South Georgia and the South Sandwich Islands• South Sudan• Spain• Sri Lanka• Sudan• Suriname• Svalbard and Jan Mayen• Swaziland• Sweden• Switzerland• Syrian Arab Republic• Taiwan• Tajikistan• Tanzania, United Republic of• Thailand• Timor-Leste• Togo• Tokelau• Tonga• Trinidad and Tobago• Tunisia• Turkey• Turkmenistan• Turks and Caicos Islands• Tuvalu• Uganda

Field	Details
	<ul style="list-style-type: none"> • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies the financial account in an external data source.</p>
VerifiedBy__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Name of the person who verified the document.</p>
VerifiedOn__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Date the identification document was verified.</p>

FinServ Lead Custom Fields

Represents a lead associated with an individual. Custom fields extend the Lead object for use in Financial Services Cloud.

Fields

Field Name	Details
CreatedByMe__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the current user created the contact record.</p>
CreatedFromLead__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a contact converted from this lead sets the value of Contact.CreatedFromLead__c as (true) or not (false).</p>
Employer__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lead's employer information that converts to the individual's contact record upon lead conversion.</p>
ExpressedInterest__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lead's expressed area of interest. Label is Category. Valid values:</p> <ul style="list-style-type: none"> • Mortgage • Personal Loan • Credit Card • Savings Account • Checking Account

Field Name	Details
	<ul style="list-style-type: none"> • HELOC • Day to Day Banking • Manage Money • Property Purchase • Investments • Education • Manage Debt
Household__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the household record associated with the lead record.
PotentialValue__c	Type currency
	Properties Filter, Nillable, Sort
	Description Potential value from converting the lead.
ProductInterest__c	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lead's area of interest. This field is deprecated. Use the ExpressedInterest__c field instead.
ReferredByContact__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description External contact who made the referral.
ReferredByUser__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	<p>Description Internal Salesforce user who made the referral.</p>
ReferrerScore__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description A value of 0 to 100. A high score reflects a high rate of referral conversion.</p>
RelatedAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Individual or household account related to a lead.</p>

FinServ_LifeEvent__c

Represents a client's life event, such as a birth or marriage.

Supported Calls

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

Fields

Field	Details
Client__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Individual the life event is related to.</p>
CurrencyIsoCode	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
DiscussionNote__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes from past discussions.</p>
EventDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the life event.</p>
EventType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of life event. Valid values:</p> <ul style="list-style-type: none"> College New Baby New Business New Home New Job Retirement
FinancialGoal__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial goal that the life event is related to.</p>
GoalType__c	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of financial goal implied by the life event. Valid values:</p> <ul style="list-style-type: none"> • Saving for College • Saving for Retirement
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the goal in an external data source.</p>

FinServ Opportunity Custom Fields

Represents an opportunity associated with an individual. Custom fields extend the Opportunity object for use in Financial Services Cloud.

Fields

Field Name	Details
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial account associated with this opportunity.</p>
ReferredByContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description External contact referring this opportunity.</p>
ReferredByUser__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
Description	
Internal user referring this opportunity.	

FinServ_PolicyPaymentMethod__c

Represents the premium payment method for a policy, such as credit card, debit card, or internet banking. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>
EndDate__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date on which the financial account was removed as the active payment method.</p>
FinancialAccount__c	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The financial account that is used to make any payments for the policy. For example, debit card, credit card, bank account.</p>
InsurancePolicy__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The policy for which this payment setup is done.</p>
IsActive__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this financial account and its billing configuration are active.</p>
IsPrimaryAccount__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the financial account is the primary billing account for the policy.</p>
PaymentPercentage__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the total bill amount that is charged to this financial account.</p>
StartDate__c	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the financial account was added as an active payment method.</p>

FinServ_ReciprocalRole__c

Represents the other entity's corresponding role in a one-to-one relationship between entities.

Supported Calls

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

Fields

Field	Details
<code>CreateInverseRole__c</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the corresponding reciprocal role record is created automatically for the inverse role (<code>true</code>) or not (<code>false</code>).</p>
<code>CurrencyIsoCode</code>	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
<code>InverseRelationship__c</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between <code>Role</code> and <code>InverseRole__c</code> so that it can be referenced by a trigger that creates the inverse relationship record.</p>
<code>InverseRole__c</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The role that the other entity occupies in the relationship, such as a grandparent to a grandchild, or an owned business to a proprietor.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this reciprocal role.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on createFilter, Group, Sort, Update</p> <p>Description ID of the user who created the reciprocal role record.</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this reciprocal role.</p>
RelationshipType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of entities involved in the relationship. Valid values:</p>

Field	Details
	<ul style="list-style-type: none"> • All • Contact Contact Relation • Account Account Relation
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description ID that uniquely identifies the reciprocal role in an external data source.</p>

FinServ_Revenue__c

Represents data from Financial Services Cloud and external systems to aggregate revenue streams for an advisor's book of business.

Supported Calls

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

Fields

Field	Details
Account__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Account that Revenue__c is related from. This field or FinancialAccount__c requires an entry but not both.</p>
Amount__c	<p>Type currency</p> <p>Properties Create, Filter Sort, Update</p> <p>Description Revenue amount.</p>
Date__c	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Date when this revenue was made.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial Account that Revenue__c is related from. This field or Account__c requires an entry but not both.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A value that uniquely identifies the revenue in an external data source.</p>
SubType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subtype of revenues. Valid values: Transaction, Advisory, Investment, Custodian, Planning.</p>
Type__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of revenues. Valid values: Fees, Commission.</p>

FinServ_Securities__c

Represents a security, such as a stock or bond.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
CUSIP__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Committee on Uniform Securities Identification Procedures identification number for the securities.</p>
Exchange__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Exchange on which the securities are traded. Valid values: <ul style="list-style-type: none"> • NYSE • NASDAQ </p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastUpdated__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Timestamp for when data for the securities was last updated by an external data source.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of the securities. Label is <code>Symbol</code>.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the securities record.</p>
Price__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current price of the securities.</p>
SecuritiesName__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name that uniquely identifies the securities.</p>
SecurityId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description ID of the securities.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the securities in an external data source.</p>

FinServ SvcCatalogRequest Custom Fields

Represents a request made by a user using the Service Catalog. The CaseId custom field extends the SvcCatalogRequest object for use in Financial Services Cloud.

Fields

Field	Details
CaseId__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with a service process request. This field is available in API version 57.0 and later. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Lookup</p> <p>Refers To Case</p>

FinServ Task Custom Fields

Represents a task associated with a client. Custom fields extend the standard Task object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Expectations that this task relates to.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the household associated with the individual.</p>
NextSteps__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Next steps for this task.</p>
Objectives__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Objectives that this task relates to.</p>
Regarding__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The nature of this task. Valid values:</p> <ul style="list-style-type: none"> • Prospecting • Onboarding • Client Retention • Service

FinServ User Custom Fields

Represents a user in your organization. Custom fields extend the standard User object for use in Financial Services Cloud.

Represents a user in your organization.

Supported Calls

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

Fields

Field	Details
ReferrerScore__c	Type double Properties Create, Filter, Nullable, Sort, Update Description A value of 0 to 100. A high score reflects a high rate of referral conversion.

FINANCIAL SERVICES CLOUD ASSOCIATED OBJECTS

This section and its subtopics provide a list of associated objects and their standard fields.

Each Financial Services Cloud object has different associated objects. For example, the Claim object has the associated objects ClaimFeed, ClaimHistory, ClaimOwnerSharingRule, and ClaimShare, but there's no ClaimChangeEvent object.

Some fields aren't listed for some objects. To see the system fields for each object, see [System Fields](#) in the *Object Reference for Salesforce and Lightning Platform*.

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

*StandardObjectName*ChangeEvent

A ChangeEvent object is available for each object that supports Change Data Capture. You can subscribe to a stream of change events using Change Data Capture to receive data tied to record changes in Salesforce. Changes include record creation, updates to an existing record, deletion of a record, and undeletion of a record. A change event isn't a Salesforce object—it doesn't support CRUD operations or queries. It's included in the object reference so you can discover which Salesforce objects support change events.

Supported Calls

```
describeSObjects()
```

Special Access Rules

- All objects may not be available in your org. Some objects require specific feature settings and permissions to be enabled.
- For more special access rules, if any, see the documentation for the standard object. For example, for AccountChangeEvent, see the special access rules for Account.

Change Event Support

Change events are available for all custom objects and a subset of standard objects. Change events that correspond to custom settings are partially supported. They aren't supported in Apex triggers but are supported in other types of subscribers.

Change Event Name

The name of a change event is based on the name of the corresponding object for which it captures the changes.

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: AccountChangeEvent

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: `MyCustomObject__ChangeEvent`

Change Event Fields

The fields that a change event can include correspond to the fields on the associated parent Salesforce object, with a few exceptions. For example, `AccountChangeEvent` fields correspond to the fields on `Account`.

The fields that a change event doesn't include are:

- The `IsDeleted` system field.
- The `SystemModStamp` system field.
- Any field whose value isn't on the record and is derived from another record or from a formula, except roll-up summary fields, which are included. Examples are formula fields. Examples of fields with derived values include `LastActivityDate` and `PhotoUrl`.

Each change event also contains header fields. The header fields are included inside the `ChangeEventHeader` field. They contain information about the event, such as whether the change was an update or delete and the name of the object, like `Account`.

In addition to the event payload, the event schema ID is included in the `schema` field. Also included is the event-specific field, `replayId`, which is used for retrieving past events.

Event Message Example

The following example is an event message in JSON format for a new account record creation.

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedById": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedById": "<User_ID>"
  },
  "event": {
    "replayId": 6
  }
}
```

API Version and Schema

When you subscribe to change events, the subscription uses the latest API version and the event messages received reflect the latest field definitions. For more information, see [API Version and Event Schema](#) in the *Change Data Capture Developer Guide*.

Usage

For more information about Change Data Capture, see [Change Data Capture Developer Guide](#).

Objects That Support Change Events

The following object has associated ChangeEvent objects.

- AccountParticipant
- AppFormProdPrpsAttribute
- AppFormProductParticipant
- ApplicationActionItem
- ApplicationForm
- ApplicationFormParticipant
- ApplicationFormProduct
- ApplicationFormProductFee
- ApplicationFormSellerItem
- AuthorizationFormConsent
- Award
- BranchUnit
- BranchUnitBusinessMember
- BranchUnitCustomer
- BranchUnitRelatedRecord
- BrokerOfRecord
- BusinessLicense
- ClaimCase
- Claim
- ClaimCovPaymentAdjustment
- ClaimCovReserveAdjustment
- ClaimCoverage
- ClaimCoveragePaymentDetail
- ClaimCoverageReserveDetail
- ClaimItem
- ClaimParticipant
- ClaimPaymentSummary
- ClaimPayoutPlan
- ClaimRecovery
- CommissionStatement

- CommissionStatementLineItem
- ContractGroupPlan
- ContractGroupPlanGroupClass
- CustomObjectParticipant
- FinancialGoal
- FinancialGoalFunding
- FinancialGoalParty
- FinancialPlan
- FinancialSecurity
- FinAssetPortfolioTgtAlloc
- GroupCensus
- GroupCensusMember
- GroupCensusMemberPlan
- GroupClass
- GroupClassContribution
- IdentityDocument
- IndexRate
- InfoAuthorizationRequest
- InsBnftEligDefinition
- InsContributionPlnGroupCls
- InsContributionPlnLineItem
- InsPolicyBenefitEligibility
- InsPolicyCoverageBenefit
- InsPolicyCoverageNetwork
- InsuranceContract
- InsuranceContributionPlan
- InsurancePolicy
- InsurancePolicyTeamMember
- InsuranceRatePlan
- InsuranceRatePlanCommission
- InsuranceRatePlanLineItem
- InteractionSummary
- MultipartyInfoAuthRequest
- OpportunityParticipant
- PartyCertifiedCapacity
- PartyFinancialAssetLien
- PartyScreeningSummary
- PartyProfileParticipant
- PaymentRequest
- PaymentRequestLine

- PersonLifeEvent
- ProducerRelationship
- ProducerSplitArngLineItem
- ProducerSplitArrangement
- ProducerSplitAssignment
- ProducerSplitRoleAssignment
- ProductFee
- ProductListRate
- QuoteLineItemGroupClass
- RelatedRecordAssocCriteria
- SecuritiesHolding
- UserFinancialAuthority

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	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the comment marked as best answer on a question post.</p>
Body	<p>Type textarea</p> <p>Properties Nillable, Sort</p> <p>Description The body of the post. Required when <code>Type</code> is <code>TextPost</code>. Optional when <code>Type</code> is <code>ContentPost</code> or <code>LinkPost</code>.</p>
CommentCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of comments associated with this feed item.</p>
ConnectionId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description When a PartnerNetworkConnection modifies a record that is tracked, the <code>CreatedBy</code> field contains the ID of the system administrator. The <code>ConnectionId</code> contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.</p>
InsertedById	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the <code>InsertedBy</code> value is set to the ID of the context user.</p>

Field	Details
isRichText	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the feed item <code>Body</code> contains rich text. If you post a rich text feed comment using SOAP API, set <code>IsRichText</code> to <code>true</code> and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags:</p> <ul style="list-style-type: none"> • <code><p></code> <p> Tip: Though the <code>
</code> tag isn't supported, you can use <code><p>&nbsp;</p></code> to create lines.</p> <ul style="list-style-type: none"> • <code><a></code> • <code></code> • <code><code></code> • <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> <p>The <code></code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code></code></p> <p> Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.</p>
LikeCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of likes associated with this feed item.</p>
LinkUrl	<p>Type url</p> <p>Properties Nillable, Sort</p>

Field	Details
	<p>Description The URL of a LinkPost.</p>
NetworkScope	<p>Type picklist</p> <p>Properties Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.</p> <p>NetworkScope can have the following values:</p> <ul style="list-style-type: none"> • NetworkId—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. • AllNetworks—The feed item is available in all Experience Cloud sites. <p>Note the following exceptions for NetworkScope:</p> <ul style="list-style-type: none"> • Only feed items with a Group or User parent can set a NetworkId or a null value for NetworkScope. • For feed items with a record parent, users can set NetworkScope only to AllNetworks. • You can't filter a feed item on the NetworkScope field.
ParentId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p>Type string</p> <p>Properties Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>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.</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Description

The type of feed item. Values are:

- `ActivityEvent`—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging).
- For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence.
- `AdvancedTextPost`—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post.
- `AnnouncementPost`—Not used.
- `ApprovalPost`—generated when a user submits an approval.
- `BasicTemplateFeedItem`—Not used.
- `CanvasPost`—a post made by a canvas app posted on a feed.
- `CollaborationGroupCreated`—generated when a user creates a public group.
- `CollaborationGroupUnarchived`—Not used.
- `ContentPost`—a post with an attached file.
- `CreatedRecordEvent`—generated when a user creates a record from the publisher.
- `DashboardComponentAlert`—generated when a dashboard metric or gauge exceeds a user-defined threshold.
- `DashboardComponentSnapshot`—created when a user posts a dashboard snapshot on a feed.
- `LinkPost`—a post with an attached URL.
- `PollPost`—a poll posted on a feed.
- `ProfileSkillPost`—generated when a skill is added to a user's Chatter profile.
- `QuestionPost`—generated when a user posts a question.
- `ReplyPost`—generated when Chatter Answers posts a reply.
- `RipplePost`—generated when a user creates a Thanks badge in WDC.
- `TextPost`—a direct text entry on a feed.
- `TrackedChange`—a change or group of changes to a tracked field.
- `UserStatus`—automatically generated when a user adds a post. Deprecated.

Field	Details
Visibility	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> • <code>AllUsers</code>—The feed item is available to all users who have permission to see the feed item. • <code>InternalUsers</code>—The feed item is available to internal users only. <p>Note the following exceptions for <code>Visibility</code>:</p> <ul style="list-style-type: none"> • For record posts, <code>Visibility</code> is set to <code>InternalUsers</code> for all internal users by default. • External users can set <code>Visibility</code> only to <code>AllUsers</code>. • On user and group posts, only internal users can set <code>Visibility</code> to <code>InternalUsers</code>.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, `AccountFeed` tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships is not available. Use `ORDER BY` on fields on the root object in the SOQL query.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- `AppFormProductParticipantFeed`
- `ApplicationActionItemFeed`
- `ApplicationFormFeed`
- `ApplicationFormParticipantFeed`
- `ApplicationFormProductFeeFeed`
- `ApplicationFormProductProposalFeed`
- `ApplicationFormSellerItemFeed`
- `AuthFormRequestRecordFeed`
- `AuthorizationFormTextFeed`
- `AwardFeed`

- BankerFeed
- BatchJobFeed
- BatchJobPartFailedRecordFeed
- BatchJobPartFeed
- BranchUnitFeed
- BranchUnitBusinessMemberFeed
- BranchUnitCustomerFeed
- BusinessLicenseFeed
- BusinessMilestoneFeed
- BusinessProfileFeed
- ClaimCaseFeed
- ClaimFeed
- ClaimItemFeed
- ClaimParticipantFeed
- ClaimPayoutPlanFeed
- ClaimRecovery
- ClaimTeamMemberFeed
- ContractGroupPlanFeed
- ContractGroupPlanGroupClassFeed
- CoverageTypeFeed
- CustomerPropertyFeed
- CustomObjectParticipantFeed
- DocumentChecklistItemFeed
- FinancialDealAssetFeed
- FinancialDealBid
- FinancialDealInteractionFeed
- FinancialDealParticipantFeed
- FinancialDealPartyFeed
- FinancialDealProductFeed
- FinancialSecurityFeed
- FinAssetPortfolioTgtAllocFeed
- FinclDeallInteractionSummaryFeed
- GroupCensusFeed
- GroupCensusMemberFeed
- GroupCensusMemberPlanFeed
- IndexRateFeed
- InfoAuthorizationRequestFeed
- InfoAuthRequestFormFeed
- InsPolicyAssetRelatedObj
- InsPolicyCvrRelatedObj

- InsPolicyPtcpRelatedObj
- InsPolicyRelatedObject
- InsPolicyTransactionDetailFeed
- InsuranceClaimAssetFeed
- InsuranceContractFeed
- InsurancePolicyAssetFeed
- InsurancePolicyCoverageFeed
- InsurancePolicyFeed
- InsurancePolicyMemberAssetFeed
- InsurancePolicyParticipantFeed
- InsuranceProfileFeed
- InteractionRelatedAccountFeed
- InteractionSumDiscussedAccountFeed
- LoanApplicantAddressFeed
- LoanApplicantDeclarationFeed
- LoanApplicantEmploymentFeed
- LoanApplicantFeed
- LoanApplicantIncomeFeed
- LoanApplicationAssetFeed
- LoanApplicationFinancialFeed
- LoanApplicationLiabilityFeed
- LoanApplicationPropertyFeed
- LoanApplicationTitleHolderFeed
- MultipartyInfoAuthRequestFeed
- PartyCertifiedCapacityFeed
- PartyExpenseFeed
- PartyIdentityVerificationFeed
- PartyIdentityVerificationStepFeed
- PartyProfileFeed
- PartyProfileAddressFeed
- PartyProfileParticipantFeed
- PartyProfileRiskFeed
- PartyScreeningStepFeed
- PartyScreeningSummaryFeed
- PaymentRequest
- PaymentRequestLine
- PersonLifeEventFeed
- ProducerFeed
- ProducerPolicyAssignmentFeed
- ProductCoverageFeed

- ProductFeeFeed
- ProductListRateFeed
- QuoteLineItemGroupClassFeed
- RecordAlertFeed
- ResidentialLoanApplicationFeed
- SecuritiesHoldingFeed
- TagCategoryFeed
- WorkerCompCoverageClassFeed

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>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the standard object.</p>
<i>DataType</i>	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Data type of the field that was changed.</p>

Field Name	Details
Field	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Name of the field that was changed.</p>
newValue	<p>Type anyType</p> <p>Properties Nillable, Sort</p> <p>Description New value of the field that was changed.</p>
oldValue	<p>Type anyType</p> <p>Properties Nillable, Sort</p> <p>Description Old value of the field that was changed.</p>

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AccountParticipantHistory
- AppFormProductParticipantHistory
- ApplicationActionItemHistory
- ApplicantHistory
- ApplicationFormHistory
- ApplicationFormParticipantHistory
- ApplicationFormProductHistory
- ApplicationFormProductFeeHistory
- ApplicationFormProductProposalHistory
- ApplicationFormSellerItemHistory
- AuthFormRequestRecordHistory
- AuthorizationFormConsentHistory
- AuthorizationFormHistory
- AuthorizationFormTextHistory
- AwardHistory

- BankerHistory
- BatchJobHistory
- BatchJobPartFailedRecordHistory
- BatchJobPartHistory
- BranchUnitHistory
- BranchUnitBusinessMemberHistory
- BranchUnitCustomerHistory
- BrokerOfRecordHistory
- BusinessLicenseHistory
- BusinessMilestoneHistory
- BusinessProfileHistory
- ClaimCaseHistory
- ClaimHistory
- ClaimItemHistory
- ClaimParticipantHistory
- ClaimPayoutPlanHistory
- ClaimRecoveryHistory
- ClaimTeamMemberHistory
- CmsnProcUsageTrackingHistory
- CommissionStatementHistory
- CommissionStatementLineItemHistory
- ContractGroupPlanHistory
- ContractGroupPlanGroupClassHistory
- CoverageTypeHistory
- CustomerPropertyHistory
- CustomObjectParticipantHistory
- DataUsePurposeHistory
- DisputeHistory
- DisputeItemHistory
- DocChkItemValidatedTargetHistory
- DocumentCategoryHistory
- FlowOrchestrationInstRelaObjHistory
- DocumentChecklistItemHistory
- FinancialDealInteractionHistory
- FinancialDealAssetHistory
- FinancialDealBidHistory
- FinancialDealParticipantHistory
- FinancialDealPartyHistory
- FinancialDealProductHistory
- FinancialGoalHistory

- FinancialPlanHistory
- FinancialSecurityHistory
- FinAssetPortfolioTgtAllocHistory
- FinclDeallInteractionSummaryHistory
- GroupCensusHistory
- GroupCensusMemberHistory
- GroupCensusMemberPlanHistory
- GroupClassHistory
- GroupClassContributionHistory
- GrpCensusGrpClassSummary
- IndexRateHistory
- InfoAuthorizationRequestHistory
- InfoAuthRequestFormHistory
- InsBnftEligDefinitionHistory
- InsContributionPlnGroupClsHistory
- InsContributionPlnLineItemHistory
- InsPolicyAssetRelatedObj
- InsPolicyBenefitEligibilityHistory
- InsPolicyCoverageBenefitHistory
- InsPolicyCoverageNetworkHistory
- InsPolicyCvrRelatedObj
- InsPolicyPtcpRelatedObj
- InsPolicyRelatedObject
- InsPolicyTransactionDetailHistory
- InsuranceClaimAssetHistory
- InsuranceContractHistory
- InsuranceContributionPlanHistory
- InsurancePolicyAssetHistory
- InsurancePolicyCoverageHistory
- InsurancePolicyHistory
- InsurancePolicyMemberAssetHistory
- InsurancePolicyParticipantHistory
- InsuranceProfileHistory
- InsuranceRatePlanHistory
- InsuranceRatePlanCommissionHistory
- InsuranceRatePlanLineItemHistory
- InteractionRelatedAccountHistory
- InteractionSumDiscussedAccountHistory
- LoanApplicantAddressHistory
- LoanApplicantAssetHistory

- LoanApplicantDeclarationHistory
- LoanApplicantEmploymentHistory
- LoanApplicantHistory
- LoanApplicantIncomeHistory
- LoanApplicantLiabilityHistory
- LoanApplicationAssetHistory
- LoanApplicationFinancialHistory
- LoanApplicationLiabilityHistory
- LoanApplicationPropertyHistory
- LoanApplicationTitleHolderHistory
- MultipartyInfoAuthRequestHistory
- PartyCertifiedCapacityHistory
- PartyExpenseHistory
- PartyIdentityVerificationHistory
- PartyIdentityVerificationStepHistory
- PartyProfileHistory
- PartyProfileAddressHistory
- PartyProfileParticipantHistory
- PartyProfileRiskHistory
- PartyScreeningStepHistory
- PartyScreeningSummaryHistory
- PaymentRequestHistory
- PaymentRequestLineHistory
- PersonEducationHistory
- PersonLifeEventHistory
- ProducerHistory
- ProducerPolicyAssignmentHistory
- ProducerSplitArngLineItemHistory
- ProducerSplitArrangementHistory
- ProducerSplitAssignmentHistory
- ProducerSplitRoleAssignmentHistory
- ProducerRelationshipHistory
- ProductCoverageHistory
- ProductFeeHistory
- ProductListRateHistory
- ProductSurcharge
- QuoteLineItemGroupClassHistory
- RecordAlertHistory
- ResidentialLoanApplicationHistory
- SecuritiesHoldingHistory

- Surcharge
- TagCategoryHistory
- UserFinancialAuthority
- WorkerCompCoverageClassHistory

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 for your org, contact Salesforce customer support. However, we recommend that you instead use Metadata API to programmatically update owner sharing rules because it triggers automatic sharing rule recalculation. The [SharingRules](#) Metadata API type is enabled for all orgs.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for *ChannelProgramOwnerSharingRule*, see the special access rules for *ChannelProgram*.

Fields

Field Name	Details
AccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> • Read (read only) • Edit (read/write)
Description	<p>Type textarea</p>

Field Name	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of the sharing rule. Maximum length is 1000 characters.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.</p>
GroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field Name	Details
	Description
	ID of the user or group that you are granting access to.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ActionPlanOwnerSharingRule
- ActionPlanTemplateOwnerSharingRule
- ApplicationFormOwnerSharingRule
- ApplicationFormProductOwnerSharingRule
- AwardOwnerSharingRule
- BankerOwnerSharingRule
- BranchUnitOwnerSharingRule
- BrokerOfRecordOwnerSharingRule
- BusinessLicenseOwnerSharingRule
- ClaimOwnerSharingRule
- ClaimRecoveryOwnerSharingRule
- CommissionStatementOwnerSharingRule
- CommissionStatementLineItemOwnerSharingRule
- ContractGroupPlanGroupClassOwnerSharingRule
- CoverageTypeOwnerSharingRule
- CustomerPropertyOwnerSharingRule
- DisputeOwnerSharingRule
- DocumentChecklistItemOwnerSharingRule
- FinancialDealOwnerSharingRule
- FinancialDealPartyOwnerSharingRule
- FinancialDealProductOwnerSharingRule
- FinancialGoalOwnerSharingRule
- FinancialPlanOwnerSharingRule
- FlowOrchestrationInstRelaObjOwnerSharingRule
- GroupCensusOwnerSharingRule
- GroupCensusmemberPlanOwnerSharingRule
- GroupClassOwnerSharingRule
- InsContributionPInGroupCIsOwnerSharingRule
- InsPolicyBenefitEligibilityOwnerSharingRule
- InsuranceContractOwnerSharingRule
- InsuranceContributionPlanOwnerSharingRule
- InsurancePolicyAssetOwnerSharingRule

- InsurancePolicyOwnerSharingRule
- InsuranceRatePlanOwnerSharingRule
- InteractionOwnerSharingRule
- InteractionSummaryOwnerSharingRule
- LoanApplicantDeclarationOwnerSharingRule
- LoanApplicantEmploymentOwnerSharingRule
- LoanApplicantIncomeOwnerSharingRule
- LoanApplicantOwnerSharingRule
- LoanApplicationAssetOwnerSharingRule
- LoanApplicationLiabilityOwnerSharingRule
- PartyCertifiedCapacityOwnerSharingRule
- PaymentRequestOwnerSharingRule
- PersonEducationOwnerSharingRule
- PersonLifeEventOwnerSharingRule
- ProducerOwnerSharingRule
- ProducerPolicyAssignmentOwnerSharingRule
- ProducerSplitArngLineItemOwnerSharingRule
- ProducerSplitArrangementOwnerSharingRule
- ProducerSplitAssignmentOwnerSharingRule
- ProducerSplitRoleAssignmentOwnerSharingRule
- ProductCoverageOwnerSharingRule
- ResidentialLoanApplicationOwnerSharingRule
- SecuritiesHoldingOwnerSharingRule
- Surcharge
- UserFinancialAuthorityOwnerSharingRule
- WorkerCompCoverageClassOwnerSharingRule

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountBrandShare, see the special access rules for AccountBrand.

Fields

Field Name	Details
AccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The level of access allowed. Values are:</p> <ul style="list-style-type: none"> • All (owner) • Edit (read/write) • Read (read only)
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the parent record.</p>
RowCause	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Reason that the sharing entry exists.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the user or group that has been given access to the object.</p>

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ApplicationActionItemShare
- ApplicationFormShare
- ActionPlanShare
- ActionPlanTemplateShare
- ApplicationFormProductShare
- ApplicationFormShare
- AuthorizationFormConsentShare
- AuthorizationFormShare
- AwardShare
- BankerShare
- BranchUnitShare
- BrokerOfRecordShare
- BusinessLicenseShare
- ClaimRecoveryShare
- ClaimShare
- CommissionStatementShare
- CommissionStatementLineItemShare
- ContractGroupPlanGroupClassShare
- CoverageTypeShare
- CustomerPropertyShare
- CustomObjectParticipantShare
- DataUsePurposeShare
- DisputeShare
- DocumentChecklistItemShare
- FinancialDealShare
- FinancialDealPartyShare
- FinancialDealProductShare
- FinancialGoalShare
- FinancialPlanShare
- FinancialSecurityShare
- FinAssetPortfolioTgtAllocShare
- FlowOrchestrationInstRelaObjShare
- GroupCensusShare
- GroupCensusMemberPlanShare
- GroupClassShare
- IndexRateShare
- InfoAuthorizationRequestShare
- InsContributionPInGroupClsShare
- InsuranceContractShare
- InsuranceContributionPlanShare

- InsurancePolicyAssetShare
- InsPolicyBenefitEligibilityShare
- InsurancePolicyShare
- InsuranceRatePlanShare
- InteractionShare
- InteractionSummaryShare
- LoanApplicantDeclarationShare
- LoanApplicantEmploymentShare
- LoanApplicantIncomeShare
- LoanApplicantShare
- LoanApplicationAssetShare
- LoanApplicationLiabilityShare
- MultipartyInfoAuthRequestShare
- PartyCertifiedCapacityShare
- PartyExpenseShare
- PartyIdentityVerificationShare
- PartyProfileShare
- PartyProfileAddressShare
- PartyProfileRiskShare
- PartyScreeningSummaryShare
- PaymentRequestShare
- PersonEducationShare
- PersonLifeEventShare
- ProducerSplitArngLineItemShare
- ProducerSplitAssignmentShare
- ProducerSplitRoleAssignmentShare
- ProducerPolicyAssignmentShare
- ProducerSplitArrangementShare
- ProducerShare
- ProductCoverageShare
- ProductFeeShare
- ProductListRateShare
- RecordAlertShare
- ResidentialLoanApplicationShare
- SecuritiesHoldingShare
- Surcharge
- TagCategoryShare
- UserFinancialAuthorityShare
- WorkerCompCoverageClassShare

APEX REFERENCE

This Apex reference goes into detail about the built-in Apex `ConnectApi` classes and interfaces for Financial Services Cloud.

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

[ConnectApi Namespace](#)

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

[commonserviceexcellence Namespace](#)

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.

[disputemanagement Namespace](#)

The `disputemanagement` namespace classes provide services for Integration Procedures that the Transaction Dispute Management OmniScript calls.

[fsccashflow Namespace](#)

The `fsccashflow` namespace provides classes used in the FSCCashFlow Flexcards and its child Flexcards.

[fsccomplaintmanagement Namespace](#)

The `fsccomplaintmanagement` namespace classes provide data helper functions for use in complaint management.

[fschousehold Namespace](#)

The `fschousehold` namespace provides classes used in the Financial Goals and Plans FlexCards.

[fscserviceprocesses Namespace](#)

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.

[fscwmgen Namespace](#)

The `fscwmgen` namespace provides an interface used for Record Alerts.

[industriespersonalizedfinance Namespace](#)

The `industriespersonalizedfinance` namespace classes provide data helper functions for use in personalized finance.

ConnectApi Namespace

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

For information about working with the `ConnectApi` classes, see [Connect in Apex](#).

[Dispute Management Methods](#)

These are `IDisputeManagementConnectFamily` methods for Financial Services Cloud.

[Public Complaint Methods](#)

These are `createComplaint(complaintMgmtrequestData)` methods for Financial Services Cloud.

[RecordAlert Methods](#)

These are `RecordAlert` methods for Financial Services Cloud.

[Input Classes](#)

These are Apex input classes in Financial Services Cloud.

[Output Classes](#)

These are Apex output classes in Financial Services Cloud.

[ConnectApi Enums](#)

Enums specific to the `ConnectApi` namespace and Industries features.

Dispute Management Methods

These are `IDisputeManagementConnectFamily` methods for Financial Services Cloud.

`ethocaAlertCallback(disputeManagementrequestData)`

Send an Ethoca alert callback for transaction dispute management.

`ethocaAlertCallback(disputeManagementrequestData)`

Send an Ethoca alert callback for transaction dispute management.

API Version

60.0

Requires Chatter

No

Signature

```
public static ConnectApi.EthocaAlertCallbackOutputRepresentation
ethocaAlertCallback(ConnectApi.EthocaAlertCallbackInputRepresentation
disputeManagementrequestData)
```

Parameters

disputeManagementrequestData

Type: [ConnectApi.EthocaAlertCallbackInputRepresentation](#)

Description: Ethoca alert input class for transaction dispute management.

Return Value

Type: [ConnectApi.EthocaAlertCallbackOutputRepresentation](#)

Public Complaint Methods

These are `createComplaint(complaintMgmtrequestData)` methods for Financial Services Cloud.

`createComplaint(complaintMgmtrequestData)`

Create a customer complaint.

createComplaint (complaintMgmtrequestData)

Create a customer complaint.

API Version

58.0

Requires Chatter

No

Signature

```
public static ConnectApi.ComplaintMgmtOutputRepresentation
createComplaint(ConnectApi.ComplaintMgmtRequestInputRepresentation
complaintMgmtrequestData)
```

Parameters

complaintMgmtrequestData

Type: [ConnectApi.ComplaintMgmtRequestInputRepresentation](#)

Input representation of the request to create a public complaint.

Return Value

Type: [ConnectApi.ComplaintMgmtOutputRepresentation](#)

Example

```
ConnectApi.ComplaintMgmtRequestInputRepresentation input = new
ConnectApi.ComplaintMgmtRequestInputRepresentation();
input.assessmentId='0U3R0000000Cp20AE';

//caseInfo
ConnectApi.CaseInfoWrapper caseInfo=new ConnectApi.CaseInfoWrapper();
caseInfo.additionalInfo = new Map<String, ConnectApi.GenericObjectWrapper>();
ConnectApi.GenericObjectWrapper caseReason= new ConnectApi.GenericObjectWrapper();
caseReason.value='case reason';
caseInfo.additionalInfo.put('Reason', caseReason);
caseInfo.accountId='001R0000004WKi1YAG';
caseInfo.subject='Reversal of Account Annual Maintenance Charges';
caseInfo.status='Pending';
caseInfo.description='Annual maintenance charges to be reversed';
caseInfo.origin='Email';
caseInfo.reason='Other';
input.caseInfo = new ConnectApi.CaseInfoWrapper();
```

```

//complaintInfo
ConnectApi.ComplaintInfoWrapper complaintInfo=new ConnectApi.ComplaintInfoWrapper();
complaintInfo.incidentDate = '2022-04-07';
complaintInfo.type = 'Information, sums/charges or product performance';
complaintInfo.subType = 'Product disclosure information';
complaintInfo.status = 'In Progress';
complaintInfo.subject = 'Account Annual Maintenance Charges';
complaintInfo.priority = 'High';
complaintInfo.description = 'Annual maintenance charges not disclosed upfront';
complaintInfo.email = 'Tody@email.com';
complaintInfo.productTye = 'Credit Card or Prepaid Card';
complaintInfo.additionalInfo=new Map<String, ConnectApi.GenericObjectWrapper>();
ConnectApi.GenericObjectWrapper sourceTypeObj= new ConnectApi.GenericObjectWrapper();
    sourceTypeObj.value=sourceType;
    complaintInfo.additionalInfo.put('SourceType', sourceTypeObj);
input.complaintInfo = new ConnectApi.ComplaintInfoWrapper();

//caseParticipantInfo
input.caseParticipantInfo = new List<ConnectApi.CaseParticipantInfoWrapper>();
ConnectApi.CaseParticipantInfoWrapper caseParticipantInfo = new
ConnectApi.CaseParticipantInfoWrapper();
caseParticipantInfo.participantId = '001R0000004KYfrYAG';
caseParticipantInfo.role = 'Complainant Representative';
caseParticipantInfo.status = 'Pending';
caseParticipantInfo.preferredCallTimeFrom = '10:30:30';
caseParticipantInfo.preferredCallTimeTo = '12:30:30';
caseParticipantInfo.preferredCommunicationMode = 'Email';
caseParticipantInfo.authorizationProof = 'Email';
input.caseParticipantInfo.add(caseParticipantInfo);

//documentInfoAttributes
ConnectApi.DocumentInfoAttributesWrapper doc1=new ConnectApi.DocumentInfoAttributesWrapper();
doc1.id='069R00000048wfYAA';
doc1.name='PAN';
doc1.typeId='0deR00000000J7YAI';

//documentInfoAttributesList
input.documentInfo=new List<ConnectApi.DocumentInfoAttributesWrapper>();
input.documentInfo.add(doc1);

input.shouldInclInRegulatoryRpt=true;
System.debug(ConnectApi.IComplaintMgmtConnectFamily.createComplaint(input));

```

RecordAlert Methods

These are RecordAlert methods for Financial Services Cloud.

[getRecordAlertsForFinancialAccount\(financialAccountId\)](#)

Retrieve a list of active record alerts on financial accounts.

[getRecordAlertsForPersonAccount\(personId\)](#)

Retrieve a list of active record alerts on person accounts.

getRecordAlertsForFinancialAccount (financialAccountId)

Retrieve a list of active record alerts on financial accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation  
getRecordAlertsForFinancialAccount (String financialAccountId)
```

Parameters

financialAccountId

Type: String

The financial account record ID.

Return Value

Type: [ConnectApi.RecordAlertCollection](#)

getRecordAlertsForPersonAccount (personId)

Retrieve a list of active record alerts on person accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation  
getRecordAlertsForPersonAccount (String personId)
```

Parameters

personId

Type: String

The person account record ID.

Return Value

Type: [ConnectApi.RecordAlertCollection](#)

Input Classes

These are Apex input classes in Financial Services Cloud.

[ConnectApi.CaseInfoWrapper](#)

Input representation of a case related to the complaint.

[ConnectApi.CaseParticipantInfoWrapper](#)

Input representation of a case participant associated with the complaint.

[ConnectApi.ComplaintInfoWrapper](#)

Input representation of the complaint details.

[ConnectApi.ComplaintMgmtRequestInputRepresentation](#)

Input representation of the request to create a public complaint.

[ConnectApi.DocumentInfoAttributesWrapper](#)

Input representation of the details of a supporting document for the complaint.

[ConnectApi.EthocaAlertCallbackInputRepresentation](#)

Ethoca alert input class for transaction dispute management.

[ConnectApi.EthocaEvent](#)

Ethoca event input class.

[ConnectApi.EthocaLinks](#)

Ethoca resource link input class.

[ConnectApi.GenericObjectWrapper](#)

Input representation of additional details of the case, case participant, or complaint.

[ConnectApi.CaseInfoWrapper](#)

Input representation of a case related to the complaint.

Property	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account associated with the complainant.	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ConnectApi.CaseParticipantInfoWrapper on page 992>	Additional information about the case.	Optional	58.0
description	String	Description of the case.	Optional	58.0
origin	String	Origin of the case. Possible values are:	Optional	58.0
		<ul style="list-style-type: none"> • Email • Phone • Web 		
reason	String	Reason for creating the case. Possible values are:	Optional	58.0
		<ul style="list-style-type: none"> • Breakdown • Equipment Complexity • Equipment Design • Feedback • Installation • Other • Performance 		
status	String	Status of the case. Possible values are:	Optional	58.0
		<ul style="list-style-type: none"> • Escalated • In Progress • New • On Hold • Response Received • Submitted • Waiting for Customer • Working 		
subject	String	Subject of the case.	Optional	58.0

ConnectApi.CaseParticipantInfoWrapper

Input representation of a case participant associated with the complaint.

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ConnectApi.ComplaintInfoWrapper on page 992>	Additional information about the case participant.	Optional	58.0
authorizationProof	String	Proof of authorization for the case participant. Possible values are: <ul style="list-style-type: none"> Email Consent Verbal Consent Power of Attorney Joint Ownership 	Required when the complainant is a customer representative, otherwise optional	58.0
participantId	String	Case participant's account ID.	Required	58.0
preferredCallTimeFrom	String	Preferred time window to call the case participant.	Optional	58.0
preferredCallTimeTo	String	Preferred time window to call the case participant.	Optional	58.0
preferredCommunication	String	Preferred mode of communication by the case participant to get updates related to the complaint.	Optional	58.0
role	String	Role of the case participant. Possible values are: <ul style="list-style-type: none"> Complainant Complainant Representative 	Optional	58.0
status	String	Status of the case related to the participant. Possible values are: <ul style="list-style-type: none"> Active In Review Pending Submitted 	Optional	58.0

ConnectApi.ComplaintInfoWrapper

Input representation of the complaint details.

Property	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account associated with the complainant.	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ComplaintDetailType on page 992>	Additional details of the complaint.	Optional	58.0
complaintSubType	String	<p>Subtype of the complaint. Possible values are:</p> <ul style="list-style-type: none"> • Account Opening/Closure • Attempts to Collect Debt not Owed • Auto Debit Mandate • Cash not Dispensed • Communication Tactics • Credit Limit Changed • Credit Report / Credit Score • Delays / Timescales • Disputes over sum/charges • Errors / not following instructions • Fraud Handling • Inaccessible ATMs • Inaccessible Branch Entrances • Inaccessible Website • Inaccessible Mobile banking features • Misleading Advertising • Mobile Banking - Features or Functionality • No Written Notification About Debt • Online Banking Features or Functionality • Other General Admin/Customer Service • Others • Problem when Making Payments • Product Disclosure Information 	Required	58.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Product Performance/Features • Unauthorized Transaction(s) Unclear Arrangement • Unclear Guidance • Unsuitable Advice 		
complaintType	String	<p>Type of the complaint. Possible values are:</p> <ul style="list-style-type: none"> • Accessibility Issues • Advising, Selling and Arranging • Digital or Technology • Financial Hardships or Collections • General Admin/ Customer Service • Information, sums/charges or product performance • Lending / Credit • Marketing or Corporate Communications • Others • Transaction Related 	Required	58.0
description	String	Description of the complaint.	Optional	58.0
email	String	Email ID of the complainant.	Optional	58.0
incidentDate	String	Date the complaint-related incident occurred.	Required	58.0
priority	String	<p>Priority of the complaint. Possible values are:</p> <ul style="list-style-type: none"> • Critical • High • Low • Medium <p>The default value is Medium.</p>	Optional	58.0
productType	String	<p>Product type related to the complaint. Possible values are:</p> <ul style="list-style-type: none"> • ATM / debit card 	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Credit Card or Prepaid Card • Insurance • Investments • Merchant Services • Mobile / electronic banking • Money transfers, virtual currency, and money services • Mortgage / Home Finance • Other • Personal Loan / other loans • Vehicle loan or lease 		
receivedDate	String	Date of reporting for the complaint.	Required	58.0
status	String	<p>Resolution status of the complaint. Possible values are:</p> <ul style="list-style-type: none"> • In Review • Pending • Resolved • Submitted <p>The default value is Submitted.</p>	Optional	58.0
subject	String	Subject of the complaint.	Optional	58.0

ConnectApi.ComplaintMgmtRequestInputRepresentation

Input representation of the request to create a public complaint.

Property	Type	Description	Required or Optional	Available Version
assessmentId	String	<p>Pre-complaint assessment ID.</p> <p>Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.</p>	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
caseInfo	ConnectApi.CaseInfoWrapper on page 985	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
caseParticipantInfo	ConnectApi.CaseParticipantInfoWrapper on page 986	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
complaintInfo	ConnectApi.ComplaintInfoWrapper on page 987	Details of the complaint to be raised.	Required	58.0
documentInfo	ConnectApi.DocumentInfoWrapper on page 991	Details of the documents supporting the complaint.	Optional	58.0
shouldIncludeInRegulatory	Boolean	Indicates whether to include the complaint in regulatory reports (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	58.0

ConnectApi.DocumentInfoAttributesWrapper

Input representation of the details of a supporting document for the complaint.

Property	Type	Description	Required or Optional	Available Version
id	String	ID of the supporting content document.	Required	58.0
name	String	Name of the supporting content document.	Required	58.0
typeId	String	ID of the supporting content document type.	Optional	58.0

ConnectApi.EthocaAlertCallbackInputRepresentation

Ethoca alert input class for transaction dispute management.

Property	Type	Description	Required or Optional	Available Version
ethocaInputPayload	List<ConnectApi.EthocaEvent>	Ethoca event input class.	Required	60.0

ConnectApi.EthocaEvent

Ethoca event input class.

Property	Type	Description	Required or Optional	Available Version
eventType	String	Type of event.	Required	60.0
id	String	ID of the event.	Required	60.0
resourceLink	ConnectApi.EthocaLinks	Resource link for the event.	Required	60.0

ConnectApi.EthocaLinks

Ethoca resource link input class.

Property	Type	Description	Required or Optional	Available Version
resource	String	Resource link.	Required	60.0

ConnectApi.GenericObjectWrapper

Input representation of additional details of the case, case participant, or complaint.

Property	Type	Description	Required or Optional	Available Version
value	Object	Additional details of the case, case participant, or complaint.	Optional	58.0

Output Classes

These are Apex output classes in Financial Services Cloud.

[ConnectApi.ComplaintMgmtOutputRepresentation](#)

Output representation of the created public complaint.

[ConnectApi.EthocaAlertCallbackOutputRepresentation](#)

Ethoca alert callback output class for dispute management.

[ConnectApi.RecordAlert](#)

Representation of the details of a record alert.

[ConnectApi.RecordAlertActionInfo](#)

Representation of the information of the record alert action.

[ConnectApi.RecordAlertActionInfoCollection](#)

Representation of the details of an action on the record alert.

[ConnectApi.RecordAlertCollection](#)

Representation of a collection of record alerts.

ConnectApi.ComplaintMgmtOutputRepresentation

Output representation of the created public complaint.

Property Name	Type	Description	Available Version
caseId	String	ID of the case associated with the created complaint.	58.0
caseNumber	String	Case number associated with the created complaint.	58.0
publicComplaintId	String	ID of the created public complaint.	58.0

ConnectApi.EthocaAlertCallbackOutputRepresentation

Ethoca alert callback output class for dispute management.

Property Name	Type	Description	Available Version
message	String	Message describing whether the request was successful.	60.0
statusCode	String	HTTP status code.	60.0

ConnectApi.RecordAlert

Representation of the details of a record alert.

Property Name	Type	Description	Available Version
actions	ConnectApi.RecordAlertActionInfoCollection	Represents the details of an action taken on a record alert.	54.0
active	Boolean	Indicates whether a record alert is active (<code>true</code>) or not (<code>false</code>).	54.0
description	String	The description of a record alert.	54.0
effectiveDate	Datetime	The start date and time from when an active record alert is in effect.	54.0
id	String	The record alert ID.	54.0
parentId	String	The parent ID of a record alert.	54.0
recordAlertCategoryName	String	The category name of a record alert.	54.0
severity	ConnectApi.RecordAlertSeverityType	Indicates the degree of impact of a record alert. Possible values are:	54.0
		• Error	

Property Name	Type	Description	Available Version
		<ul style="list-style-type: none"> Info Warning 	
source	ConnectApi. RecordAlertSourceTypeEnum	Identifies the source system that generated the record alert. Possible values are: <ul style="list-style-type: none"> Apex Internal 	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	54.0
subject	String	The subject line of a record alert.	54.0
validUntilDate	Datetime	The date and time from when a record alert is no longer valid.	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	54.0

ConnectApi.RecordAlertActionInfo

Representation of the information of the record alert action.

Property Name	Type	Description	Available Version
actionName	String	The name of the action performed on a record alert. Possible values are: <ul style="list-style-type: none"> Dismiss Snooze 	54.0
parameters	List<String>	List of parameters specified for the record alert action.	54.0

ConnectApi.RecordAlertActionInfoCollection

Representation of the details of an action on the record alert.

Property Name	Type	Description	Available Version
actionInfoCollection	List<ConnectApi. RecordAlertActionInfo>	Represents the action details of a record alert.	54.0

ConnectApi.RecordAlertCollection

Representation of a collection of record alerts.

Property Name	Type	Description	Available Version
recordAlerts	List<ConnectApi. RecordAlert>	Represents the details of a record alert.	54.0

ConnectApi Enums

Enums specific to the ConnectApi namespace and Industries features.

ConnectApi enums inherit all properties and methods of Apex enums.

Enums are not versioned. Enum values are returned in all API versions. Clients should handle values they don't understand gracefully.

Enum	Description
ConnectApi. EthocaAlertOutcome	Type of Ethoca alert outcome. <ul style="list-style-type: none">• AccountSuspended• InProgress• NotFound• NotProvided• Other• PartiallyStopped• PreviouslyCancelled• PreviouslyRefunded• Resolved• ShipperContacted• Stopped• TooLate• UnresolvedDispute
ConnectApi. EthocaAlertRefundStatus	Type of Ethoca alert refund status. <ul style="list-style-type: none">• NotRefunded• NotSettled• Refunded
ConnectApi. EthocaEventType	Type of Ethoca event. <ul style="list-style-type: none">• AlertOutcomeUpdated• BatchProcessed
ConnectApi. RecordAlertSourceTypeEnum	Type of source system. <ul style="list-style-type: none">• Apex• Internal
ConnectApi. RecordAlertSeverityType	Type of severity. <ul style="list-style-type: none">• Error

Enum	Description
	<ul style="list-style-type: none">Info
	<ul style="list-style-type: none">Warning

commonserviceexcellence Namespace

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.

 **Note:** The `commonserviceexcellence` namespace cannot be used in DML operations.

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

[IntegrationHandler Class](#)

Use the callable `IntegrationHandler` class to fetch financial transaction data.

IntegrationHandler Class

Use the callable `IntegrationHandler` class to fetch financial transaction data.

Namespace

[commonserviceexcellence](#)

Usage

The `ServiceExcellenceAlertCard` and `ServiceExcellenceGenericAlertCard` have Integration Procedure data sources that call the `IntegrationHandler` class. These FlexCards display information about financial accounts.

All of the `IntegrationHandler` methods reference an Integration Definition configured in Setup. Some methods reference the **Fetch Real Time Financial Account Info** preference in Setup.

[IntegrationHandler Methods](#)

The following are methods for `IntegrationHandler`. You can use the `call` method to invoke the `executeOmniCallback` or `getOmniContinuation` method, or you can invoke those methods directly.

[call\(action, args\)](#)

This method calls one of the available `IntegrationHandler` actions and passes arguments to that action.

[executeCallout\(requestId, payload, devName\)](#)

Calls the provider class defined in the Integration Definition record referenced by the `devName` parameter. The Industries: SendApex Async Request invocable action calls this method.

executeLightningCallback(labels, state)

Calls back the method that is called automatically after the Continuation from getLightningContinuation is executed. Internally calls the callback method of the provider.

executeOmniCallback(input, output, options)

Calls back the method that is called automatically after the Continuation from getOmniContinuation is executed. Internally calls the callback method of the provider.

getLightningContinuation(requestId, params, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

getOmniContinuation(requestId, params, options, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

call(action, args)

This method calls one of the available IntegrationHandler actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters*action*

Type: String

The action to call. The value must be one of the following method names:

- *executeOmniCallback* — Invokes the [executeOmniCallback](#) method.
- *getContinuation* — Invokes the [getOmniContinuation](#) method.
- *getTransactionProperties* — Checks if the org has the **Fetch Real Time Financial Account Info** preference set to on. If the preference is on, FlexCards display data from the core banking system.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes.

For the getTransactionProperties action, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

The getTransactionProperties action returns the orgHasFetchFAInfo property, which is true or false based on whether the **Fetch Real Time Financial Account Info** preference is on or off.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

executeCallout(requestId, payload, devName)

Calls the provider class defined in the Integration Definition record referenced by the devName parameter. The Industries: SendApex Async Request invocable action calls this method.

Signature

```
global static IntegrationCalloutResponse executeCallout(String requestId, String payload,  
String devName)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the record containing the input data to the API call.

payload

Type: String

Represents any string that needs to be passed directly to the provider.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

Return Value

Returns the IntegrationCalloutResponse object, which contains the following properties:

- Boolean isSuccess — Indicates if the API call was successful.
- Map<String, Object> returnValue — Response from the API call after the callback method has processed the response.
- String error — Contains the error message in case of an error.

executeLightningCallback(labels, state)

Calls back the method that is called automatically after the Continuation from getLightningContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeLightningCallback(List<String> labels, Map<String, Object>  
state)
```

Parameters

labels

Type: List<String>

Represents a list of label strings for retrieving the callout responses.

state

Type: Map<String, Object>

Represents a map with the request ID, provider key, and Continuation state.

Return Value

Returns one of the following:

- If successful, returns a Map<String, Object> response from the API call after the callback method has processed the response.
- If unsuccessful, returns a String value containing the error message.

Usage

This method isn't meant to be called directly — the LWC framework calls it automatically.

executeOmniCallback(*input*, *output*, *options*)

Calls back the method that is called automatically after the Continuation from getOmniContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeOmniCallback(Map<String, Object> input, Map<String, Object> output, Map<String, Object> options)
```

Parameters

input

Type: Map<String, Object>

Represents the original input that was passed into getOmniContinuation method.

output

Type: Map<String, Object>

Represents the output from the API call.

options

Type: Map<String, Object>

Represents parameters passed by OmniStudio.

Return Value

Returns the IntegrationCalloutResponse object, which contains the following properties:

- Boolean isSuccess — Indicates if the API call was successful.
- Map<String, Object> returnValue — Response from the API call after the callback method has processed the response.
- String error — Contains the error message in case of an error.

Usage

This method isn't meant to be called directly — the [OmniContinuation](#) framework calls it automatically.

getLightningContinuation(*requestId*, *params*, *devName*, *input*)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

Signature

```
global static Continuation getLightningContinuation(String requestId, Map<String, String> params, String devName, Map<String, Object> input)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the request.

params

Type: Map<String, String>

Represents parameters passed directly to the provider class.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

input

Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the [Continuation](#) object.

Usage

To use this class:

1. Create a provider class or preprocessor and postprocessor OmniStudio assets.
2. Define an Integration Definition record in Setup.
3. Call this method to get the Continuation to call from the LWC component.

getOmniContinuation(*requestId*, *params*, *options*, *devName*, *input*)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

Signature

```
global static Continuation getOmniContinuation(String requestId, Map<String, String> params, Map<String, Object> options, String devName, Map<String, Object> input)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the request.

params

Type: Map<String, String>

Represents parameters passed directly to the provider class.

options

Type: Map<String, Object>

Represents parameters passed by OmniStudio.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

input

Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the [Continuation](#) object.

Usage

To use this class:

1. Create a provider class that implements the ServiceIntegrationProvider interface, or create preprocessor and postprocessor OmniStudio assets.
2. Define an Integration Definition record in Setup.
3. Call this method to get the Continuation to call from an Integration Procedure.

disputemanagement Namespace

The `disputemanagement` namespace classes provide services for Integration Procedures that the Transaction Dispute Management OmniScript calls.

 **Note:** The `disputemanagement` namespace cannot be used in DML operations.

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

[DisputeMgmtHelper Class](#)

Use the callable `DisputeMgmtHelper` class to provide data helper functions for use in the Transaction Dispute Management OmniScript, such as raising a dispute request or creating a dispute merchant alert.

DisputeMgmtHelper Class

Use the callable DisputeMgmtHelper class to provide data helper functions for use in the Transaction Dispute Management OmniScript, such as raising a dispute request or creating a dispute merchant alert.

Namespace

disputemanagement

DisputeMgmtHelper Methods

The following are methods for `DisputeMgmtHelper`.

DisputeMgmtHelper Methods

The following are methods for `DisputeMgmtHelper`.

`DisputeMgmtHelper` is a callable class. Its main method is `call`.

`call(action, args)`

This method calls one of the available `DisputeMgmtHelper` actions and passes arguments to that action.

`getDisputeItems(caseld)`

Returns disputed transactions related to the specified Case ID. Called by the `createDisputeItemMerchAlert`, `getAlertStatusDetails`, `getDisputeBatchDetails` actions of the `call` method.

`getEthocaAPIRequest(disputeItems, disputeType, namedCredential)`

Prepares the payload used in the dispute flow and sends it to the integration provider, retrying if necessary.

`call(action, args)`

This method calls one of the available `DisputeMgmtHelper` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following actions:

- `containsCardTransactions` — Returns `true` if any transactions contain `transactionCode` values.
- `convertUploadedDocuments` — Converts uploaded document data to list format.
- `createDisputeItemMerchAlert` — Creates a merchant alert based on a Case ID for disputed transactions and batch data.
- `deleteAssessmentResponses` — Deletes the assessment responses related to the specified Assessment ID.
- `filterTransactions` — Separates transactions into different lists based on the deflection outcome.
- `generateRequestGuid` — Creates a GUID for the dispute request.

- `getAlertStatusDetails` — Returns merchant alert data related to the specified Case ID.
- `getDisputeBatchDetails` — Returns dispute and batch data related to the specified Case ID.
- `getPayloadForRetry` — Returns the input list in a SelectedTransactions list.
- `raiseDispute` — Assembles transaction dispute data, creates objects related to the transaction dispute, and returns summary data.
- `segregateTransactions` — Separates transactions according to the enrichment provider, either Plaid or Consumer Clarity.
- `setDisputedTransactions` — Converts transaction data in String format to a list.
- `setTransactions` — Adds enrichment provider data, either Plaid or Consumer Clarity, to the list of transactions, and cleans up errors in the data.
- `updateDisputedTransactionsAfterEnrichment` — Updates the list of disputed transactions after enrichment provider data is added.
- `validateDisputedTransactions` — Checks the disputed amounts for errors.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them. Values listed here are for the input argument.

- `containsCardTransactions`, `segregateTransactions`, `setTransactions` — Accepts a SelectedTransactions list.
- `convertUploadedDocuments` — Accepts uploaded document data in either List<Object> or Map<String, Object> format.
- `createDisputeItemMerchAlert` — Accepts caseId, batchId, and batchStatus values.
- `deleteAssessmentResponses` — Accepts an assessmentId.
- `filterTransactions`, `validateDisputedTransactions` — Accepts a DisputedTransactions list.
- `generateRequestGuid` — No input is needed.
- `getAlertStatusDetails`, `getDisputeBatchDetails` — Accepts a caseId.
- `getPayloadForRetry` — Accepts a list of transactions.
- `raiseDispute` — Accepts under input:
 - AccountId, AssessmentId, FinancialAccountId, Type, SubType, and Description values to be written to a Dispute object
 - HasValidTransactions, HasInvalidTransactions, HasClearForWriteOffTransactions, and IsAllTransactionResolved boolean values
 - ResolvedTransactions and SelectedTransactions lists
- `setDisputedTransactions` — Accepts SelectedTransactions data in either Map<String, Object> or String format.
- `updateDisputedTransactionsAfterEnrichment` — Accepts DisputedTransactions, ResolvedTransactions, and CurrentDisputedAmount lists.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *containsCardTransactions* — Returns true in a `containsCardTransactions` key if any transactions contain `transactionCode` values.
- *convertUploadedDocuments* — Returns uploaded document data in `List<Object>` format under a `Documents` key and the size of the list in a `DocumentsListSize` key.
- *createDisputeItemMerchAlert, deleteAssessmentResponses* — Returns no output.
- *filterTransactions* — Returns under output:
 - Transaction lists under the `DisputedTransactions`, `ValidTransactions`, `ClearForWriteOffTransactions`, and `InvalidTransactions` keys
 - `HasValidTransactions`, `HasInvalidTransactions`, and `HasClearForWriteOffTransactions` keys with values of `true` or `false`
- *generateRequestGuid* — Returns a `RequestGuid` key with a GUID for the dispute request as its value.
- *getAlertStatusDetails* — Returns a `disputesItemsMerchantAlerts` list, a `disputeItems` list, and `batchId` and `batchStatus` values.
- *getDisputeBatchDetails* — Returns `disputeId`, `batchId`, and `batchStatus` values.
- *getPayloadForRetry* — Returns the input list in a `SelectedTransactions` list.
- *raiseDispute* — Returns an `apiResponse` key with `caseId`, `caseNumber`, and `svcCatalogRequestId` keys under it.
- *segregateTransactions* — Returns a list of transaction data for each enrichment provider under the `PlaidTransactions` and `ConsumerClarityTransactions` keys.
- *setDisputedTransactions* — Returns a list of transaction data under the `DisputedTransactions` key.
- *setTransactions* — Returns a list of transaction data under the `DisputedTransactions` key. For each transaction, it adds a `ProviderName` to specify the enrichment provider and other merchant-related information such as `MerchantName`, `Category`, and `Address`.
- *updateDisputedTransactionsAfterEnrichment* — Returns a list of transaction data under the `DisputedTransactionsAfterEnrichment` key.
- *validateDisputedTransactions* — Returns the keys `NegativeDisputeAmountError`, `DisputeAmountGreaterError`, and `InvalidDisputeAmountError` with values of `true` or `false`.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

getDisputeItems (caseId)

Returns disputed transactions related to the specified Case ID. Called by the `createDisputeItemMerchAlert`, `getAlertStatusDetails`, `getDisputeBatchDetails` actions of the call method.

Signature

```
public static Map<String, Object> getDisputeItems(String caseId)
```

Parameters

`caseId`

Type: String

The ID of the Case related to the disputed transactions.

Return Value

Type: Map<String, Object>

Returns the disputed transactions related to the specified Case ID.

Example

Here is sample output. The keys correspond to DisputeItem object fields.

```
{
  "output": [
    {
      "transaction_date": "2023-01-01",
      "transaction_identifier": "1",
      "transaction_amount": 213.1,
      "transaction_description": "t1"
    },
    {
      "transaction_date": "2023-01-01",
      "transaction_identifier": "2",
      "transaction_amount": 150.94,
      "transaction_description": "t2"
    }
  ]
}
```

getEthocaAPIRequest(disputeItems, disputeType, namedCredential)

Prepares the payload used in the dispute flow and sends it to the integration provider, retrying if necessary.

Signature

```
public static HttpRequest getEthocaAPIRequest(List<DisputeItem> disputeItems, String
disputeType, String namedCredential)
```

Parameters

disputeItems

Type: List<DisputeItem>

Disputed transaction data in the following JSON format:

```
[
  {
    "transaction_date": "2023-01-01",
    "transaction_identifier": "1",
    "transaction_amount": 213.1,
    "transaction_description": "t1"
  },
  {
    "transaction_date": "2023-01-01",
```

```
        "transaction_identifier": "2",
        "transaction_amount": 150.94,
        "transaction_description": "t2"
    }
]
```

The keys correspond to DisputeItem object fields.

disputeType

Type: String

A value of the Dispute object's DisputeType picklist field:

- Processing Error
- Consumer Dispute
- Fraud

namedCredential

Type: String

The named credential for accessing the integration provider.

Return Value

Type: [HttpRequest](#)

Returns an HttpRequest that includes the disputed transaction data and sends it to the integration provider, retrying if necessary.

fsccashflow Namespace

The `fsccashflow` namespace provides classes used in the FSCCashFlow Flexcards and its child Flexcards.

The `fsccashflow` namespace has these classes.

[FSCCashFlowUtil Class](#)

Use the callable FSCCashFlowUtil class to manage and validate data for party income and expense entities by passing in the action and the corresponding arguments. This class provides utility methods used in FSCCashFlow Flexcard and its child Flexcards.

FSCCashFlowUtil Class

Use the callable FSCCashFlowUtil class to manage and validate data for party income and expense entities by passing in the action and the corresponding arguments. This class provides utility methods used in FSCCashFlow Flexcard and its child Flexcards.

Namespace

[fsccashflow Namespace](#)

Usage

The Financial Goals FlexCards use Integration Procedures that call the FSCHouseholdService class. These FlexCards display information about Financial Goals.

[FSCCashFlowUtil Methods](#)

FSCCashFlowUtil Methods

The `FSCCashFlowUtil` has these methods.

[GetPartyIncomeFrequencyLabel](#)

Returns the picklist values for the party income frequency field on the party income entity.

[GetPartyIncomeTypeLabel](#)

Returns the picklist values for the party income type field on the party income entity.

[GetPartyIncomeStatusLabel](#)

Returns the picklist values for the party income status field on the party income entity.

[CalculateIncomeExpenseSummary](#)

Calculates the monthly income, total income, average monthly income, monthly expense, total expense, average monthly expense from a list of income and expenses provided.

[GetPartyExpenseFrequencyLabel](#)

Returns the picklist values for the party expense frequency field on the party expense entity.

[GetPartyExpenseTypeLabel](#)

Returns the picklist values for the party expense type field on the party expense entity.

[GetPartyExpenseStatusLabel](#)

Returns the picklist values for the party expense status field on the party expense entity.

[PerformIncomeValidation](#)

Performs validations on Party Income records. Ensure that the start date is not earlier than the end date.

[PerformExpenseValidation](#)

Performs validations on Party Income records.

[GetDurationDateRange](#)

Returns the start and end date given a duration. For example, if you input the number 3 on the date 10/29/2024, it will return a start date of 7/1/2024 and an end date of 10/1/2024.

[HandleUpsetError](#)

Helper method that constructs the error response for upsert of a partyIncome or partyExpense record.

[CheckReadAccess](#)

Checks for read access on the partyIncome and partyExpense entities.

[CheckCrudOnIncome](#)

Checks create, update and delete access on partyIncome entity.

[CheckCrudOnExpense](#)

Checks create, update and delete access on partyExpense entity.

[GetPartyIncomeFrequencyLabel](#)

Returns the picklist values for the party income frequency field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income frequency.

GetPartyIncomeTypeLabel

Returns the picklist values for the party income type field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income type.

GetPartyIncomeStatusLabel

Returns the picklist values for the party income status field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income status.

CalculateIncomeExpenseSummary

Calculates the monthly income, total income, average monthly income, monthly expense, total expense, average monthly expense from a list of income and expenses provided.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns income and expense details.

Examples

Input and output JSON example of the actions are as follows.

Input format:

```
[
  {
    "Duration": "12",
    "PartyExpenseList": [
      {
        "Name": "PE-0000000004",
        "UsageType": "CashFlow",
        "RecurrenceInterval": "Monthly",
        "Type": "Child Care",
        "Id": "2n3SG000007dkzpYAA",
        "TotalAmount": 999.99,
        "PartyId": "001SG000004TCczYAG",
        "Status": "Active",
        "StartDate": "2024-01-29T08:00:00.000Z"
      }
    ],
    "PartyIncomeList": [
      {
        "Name": "PI-0000000003",
        "UsageType": "CashFlow",
        "IncomeFrequency": "Monthly",
        "IncomeType": "Salary",
        "Id": "2m3SG000007dkzpYAA",
        "IncomeAmount": 999.99,
        "PartyId": "001SG000004TCczYAG",
        "IncomeStatus": "Active",
        "StartDate": "2024-01-29T08:00:00.000Z"
      }
    ]
  }
]
```

Output format:

```
[
  {
    "MonthlyIncome": {
      "Nov 2023": 0,
      "Aug 2024": 999.99,
      "Oct 2023": 0,
      "Jan 2024": 96.7732258064516,
      "Mar 2024": 999.99,
      "Jul 2024": 999.99,
      "Apr 2024": 999.99,
      "Dec 2023": 0,
      "Jun 2024": 999.99,
      "Sep 2024": 999.99,
      "Feb 2024": 999.99,
      "May 2024": 999.99
    },
    "MonthlyExpense": {
      "Nov 2023": 0,
      "Aug 2024": 999.99,
    }
  }
]
```

```
        "Oct 2023": 0,
        "Jan 2024": 96.7732258064516,
        "Mar 2024": 999.99,
        "Jul 2024": 999.99,
        "Apr 2024": 999.99,
        "Dec 2023": 0,
        "Jun 2024": 999.99,
        "Sep 2024": 999.99,
        "Feb 2024": 999.99,
        "May 2024": 999.99
    },
    "AvgMonthlyExpense": 674.72,
    "TotalIncome": 8096.69,
    "TotalSurplus": 0,
    "AvgMonthlyIncome": 674.72,
    "AvgMonthlySurplus": 0,
    "TotalExpense": 8096.69
}
]
```

GetPartyExpenseFrequencyLabel

Returns the picklist values for the party expense frequency field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense frequency.

GetPartyExpenseTypeLabel

Returns the picklist values for the party expense type field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense type.

GetPartyExpenseStatusLabel

Returns the picklist values for the party expense status field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense status.

PerformIncomeValidation

Performs validations on Party Income records. Ensure that the start date is not earlier than the end date.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income type.

Examples

Input and output JSON example of the actions are as follows.

Input format:

```
[  
  {  
    "IncomeFrequency": "Weekly",  
    "IncomeFrequencyLabelObject": {  
      "value": "Weekly",  
      "label": "Weekly"  
    },  
    "MemberOptionsList": [  
      {  
        "value": "001OG00000xx6gAYAQ",  
        "label": "Okee PA"  
      },  
      {  
        "value": "id2",  
        "label": "Name2"  
      }  
    ],  
    "IsHousehold": true,  
    "IncomeAmount": 100,  
    "IncomeStatusOptions": [  
      {  
        "value": "Active",  
        "label": "Active"  
      },  
      {  
        "value": "Inactive",  
        "label": "Inactive"  
      }  
    ],  
    "PartyId": "001OG00000xx6gAYAQ",  
    "IncomeStatus": "Active",  
    "Party": {  
      "Name": "Okee PA",  
    }  
  }  
]
```

```

        "Id": "001OG00000xx6gAYAQ"
    },
    "IncomeTypeOptions": [
        {
            "value": "Salary",
            "label": "Salary"
        },
        {
            "value": "Commission",
            "label": "Commission"
        },
        {
            "value": "Fees",
            "label": "Fees"
        },
        {
            "value": "Rent",
            "label": "Rent"
        }
    ],
    "StartDate": "2024-02-02T00:00:00.000Z",
    "Name": "PI-0000000009",
    "FrequencyOptions": [
        {
            "value": "Weekly",
            "label": "Weekly"
        },
        {
            "value": "Monthly",
            "label": "Monthly"
        },
        {
            "value": "Yearly",
            "label": "Yearly"
        }
    ],
    "UsageType": "CashFlow",
    "IncomeId": "2m3OG000000009xxAQ",
    "IsPersonAccount": false,
    "IncomeTypeLabelObject": {
        "value": "Salary",
        "label": "Salary"
    }
}
]

```

Output format:

```
[
{
    "dateErrorMessage": null,
    "IncomeFrequency": "Weekly",
    "IncomeFrequencyLabelObject": {
        "value": "Weekly",
        "label": "Weekly"
    }
}
```

```
},
"MemberOptionsList": [
  {
    "value": "001OG000003f6gAYAQ",
    "label": "Okee PA"
  },
  {
    "value": "id2",
    "label": "Name2"
  }
],
"requiredFieldErrorMessage": "Required fields:Type",
"IsHousehold": true,
"IncomeAmount": 100,
"PartyId": "001OG000003f6gAYAQ",
"IncomeStatusOptions": [
  {
    "value": "Active",
    "label": "Active"
  },
  {
    "value": "Inactive",
    "label": "Inactive"
  }
],
"Party": {
  "Name": "Okee PA",
  "Id": "001OG000003f6gAYAQ"
},
"IncomeStatus": "Active",
"hasUpsertError": false,
"IncomeTypeOptions": [
  {
    "value": "Salary",
    "label": "Salary"
  },
  {
    "value": "Commission",
    "label": "Commission"
  },
  {
    "value": "Fees",
    "label": "Fees"
  },
  {
    "value": "Rent",
    "label": "Rent"
  }
],
"StartDate": "2024-02-02T00:00:00.000Z",
"Name": "PI-0000000009",
"FrequencyOptions": [
  {
    "value": "Weekly",
    "label": "Weekly"
  }
]
```

```
        "label": "Weekly"
    },
    {
        "value": "Monthly",
        "label": "Monthly"
    },
    {
        "value": "Yearly",
        "label": "Yearly"
    }
],
"UsageType": "CashFlow",
"IncomeId": "2m3OG000000009IYAQ",
"IsPersonAccount": false,
"IncomeTypeLabelObject": {
    "value": "Salary",
    "label": "Salary"
}
}
]
```

PerformExpenseValidation

Performs validations on Party Income records.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income frequency.

Examples

Output JSON example of the actions are as follows.

Output format:

```
{
    "Required fields": "Expense Type, Member, Amount, Start Date, Frequency"
}
```

GetDurationDateRange

Returns the start and end date given a duration. For example, if you input the number 3 on the date 10/29/2024, it will return a start date of 7/1/2024 and an end date of 10/1/2024.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns the start and end date for a specified duration.

Examples

Output JSON example of the actions are as follows.

Output format:

```
{  
    "DurationStartDate": "2024-02-02T00:00:00.000Z",  
    "DurationEndDate": "2024-05-02T00:00:00.000Z"  
}
```

HandleUpsertError

Helper method that constructs the error response for upsert of a partyIncome or partyExpense record.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of errors encountered while upserting the record in the database.

Examples

Input and output JSON example of the action are as follows.

Input format:

```
[  
    {  
        "Name": "PI-0000000003",  
        "UsageType": "CashFlow",  
        "IncomeFrequency": "Monthly",  
        "IncomeType": "Salary",  
        "Id": "2m3SG000007dkxxYAA",  
        "IncomeAmount": 999.99,  
        "PartyId": "001SG000004TCxxYAG",  
        "IncomeStatus": "Active",  
        "StartDate": "2024-01-29T08:00:00.000Z"  
    }  
]
```

Output format:

```
[ { "UpsertError": "Invalid Id" } ]
```

CheckReadAccess

Checks for read access on the partyIncome and partyExpense entities.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether read access is granted or not.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isAccessible" : "true" }
```

CheckCrudOnIncome

Checks create, update and delete access on partyIncome entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether create, update and delete access on the partyIncome entity is given.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isCreatable" : "true", "isUpdateable" : "true", "isDeletable": "true" }
```

CheckCrudOnExpense

Checks create, update and delete access on partyExpense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether create, update and delete access on the partyExpense entity is given.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isCreatable" : "true", "isUpdateable" : "true", "isDeletable": "true" }
```

fsccomplaintmanagement Namespace

The `fsccomplaintmanagement` namespace classes provide data helper functions for use in complaint management.

 **Note:** The `fsccomplaintmanagement` namespace cannot be used in DML operations.

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

[ComplaintMgmtHelper Class](#)

Use the callable `ComplaintMgmtHelper` class to provide data helper functions for use in the Complaint Management OmniScript.

[AssessmentHelperFunction Class](#)

Use the callable `AssessmentHelperFunction` class to provide helper functions for assessment data to use in complaint management.

ComplaintMgmtHelper Class

Use the callable `ComplaintMgmtHelper` class to provide data helper functions for use in the Complaint Management OmniScript.

Namespace

[fsccomplaintmanagement](#)

[ComplaintMgmtHelper Methods](#)

The following are methods for `ComplaintMgmtHelper`.

ComplaintMgmtHelper Methods

The following are methods for `ComplaintMgmtHelper`.

`ComplaintMgmtHelper` is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available `ComplaintMgmtHelper` actions and passes arguments to that action.

call (action, args)

This method calls one of the available `ComplaintMgmtHelper` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following actions:

- *callCreateComplaintApi* — Prepares data for and calls the [ConnectApi.ComplaintMgmtRequestInputRepresentation](#) method and its sub-representations.
- *convertUploadedDocuments* — Converts uploaded document data to list format.
- *getbasePath* — Returns the URL path prefix of the current site or an empty string if none. See [getPathPrefix\(\)](#).
- *sortList* — Sorts a list.
- *validateTimeRange* — Checks if the start time is before the end time.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them. Values listed here are for the input argument.

- *callCreateComplaintApi* — Accepts data in these keys: AccountId, arguments, AssessmentId, AuthorizationProof, CaseReason, Description, Documents, Email, FinAccountsMasterList, FinancialAccount, FromTime, ParticipantId, PreferredCommunicationMode, Priority, ProductType, ShouldInclInRegulatoryRpt, SourceType, Status, Subject, SubType, TillTime, Type.
- *convertUploadedDocuments* — Accepts uploaded document data in either List<Object> or Map<String, Object> format.
- *getbasePath* — No input is needed.
- *sortList* — Accepts a list in List<Object> or String format under an unorderedList key.
- *validateTimeRange* — Accepts start and end times in FromTime and TillTime keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *callCreateComplaintApi* — Returns data in a result key with these keys under it: caseId, caseNumber, and publicComplaintId.
- *convertUploadedDocuments* — Returns uploaded document data in List<Object> format under a Documents key and the size of the list in a DocumentsListSize key.
- *getbasePath* — Returns the URL path prefix of the current site in a basePath key.
- *sortList* — Returns a sorted list under a sortedList key.
- *validateTimeRange* — Returns a result key with a value of Valid or Invalid.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

AssessmentHelperFunction Class

Use the callable AssessmentHelperFunction class to provide helper functions for assessment data to use in complaint management.

Namespace

[fsccomplaintmanagement](#)

AssessmentHelperFunction Methods

The following are methods for `AssessmentHelperFunction`.

AssessmentHelperFunction Methods

The following are methods for `AssessmentHelperFunction`.

`AssessmentHelperFunction` is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available `AssessmentHelperFunction` actions and passes arguments to that action.

call (action, args)

This method calls one of the available `AssessmentHelperFunction` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The only action is `deleteAssessmentResponses`.

- `deleteAssessmentResponses` — Deletes the Assessment object with the specified Assessment ID along with all the related assessment responses.

`args`

Type: `Map<String, Object>`

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- `deleteAssessmentResponses` — Accepts an `AssessmentId`.

Return Value

Type: `Map<String, Object>`

The return values of the corresponding action, returned in the output argument.

- `deleteAssessmentResponses` — Returns null.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

fschousehold Namespace

The `fschousehold` namespace provides classes used in the Financial Goals and Plans FlexCards.

 **Note:** The `fschousehold` namespace cannot be used in DML operations.

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

[FSCFinancialAccountService Class](#)

Use the callable `FSCFinancialAccountService` class to return `true` if the `FinancialAccountMgmtPref` permission is enabled in the org.

[FSCGoalService Class](#)

Use the callable `FSCGoalService` class to return either picklist values of a Financial Goal object or `true` if the user has Create, Edit, or Delete access to the `FinancialGoal` object.

[FSCHouseholdService Class](#)

Use the callable `FSCHouseholdService` class to accept a Person Account ID corresponding to a member of a Household and return the other Household members.

[FSCPlansAndGoalsUtil Class](#)

The `FSCPlansAndGoalsUtil` class provides utilities to the other Apex classes in the `fschousehold` namespace.

[FSCPlanService Class](#)

Use the callable `FSCPlanService` class to return picklist values of a Financial Plan object.

[RetrievalSummaryDataRefresh Class](#)

Use the callable `RetrievalSummaryDataRefresh` wrapper class to refresh `retrievalSummaryDefinition` associated rollups.

FSCFinancialAccountService Class

Use the callable `FSCFinancialAccountService` class to return `true` if the `FinancialAccountMgmtPref` permission is enabled in the org.

Namespace

[fschousehold](#)

Usage

The Financial Goals FlexCards use Integration Procedures that call the `FSCFinancialAccountService` class. These FlexCards display information about Financial Goals.

[FSCFinancialAccountService Methods](#)

The following are methods for `FSCFinancialAccountService`.

FSCFinancialAccountService Methods

The following are methods for `FSCFinancialAccountService`.

`FSCFinancialAccountService` is a callable class. Its only method is `call`.

call(action, args)

This method calls one of the available FSCFinancialAccountService actions and passes arguments to that action.

call(action, args)

This method calls one of the available FSCFinancialAccountService actions and passes arguments to that action.

API Version

60.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters*action*

Type: String

The action to call. The value must be one of the following action names:

- *isFinancialAccountMgmtPrefEnabled* — Returns `true` if the FinancialAccountMgmt permission is enabled in the org.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes.

None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCGoalService Class

Use the callable FSCGoalService class to return either picklist values of a Financial Goal object or `true` if the user has Create, Edit, or Delete access to the FinancialGoal object.

Namespace

fschousehold

Usage

The Financial Goals FlexCards use OmniScripts and Integration Procedures that call the FSCGoalService class. These FlexCards display information about Financial Goals.

[FSCGoalService Methods](#)

The following are methods for `FSCGoalService`.

FSCGoalService Methods

The following are methods for `FSCGoalService`.

`FSCGoalService` is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available `FSCGoalService` actions and passes arguments to that action.

call(action, args)

This method calls one of the available `FSCGoalService` actions and passes arguments to that action.

API Version

59.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following action names:

- `FinancialGoalPriority` — Returns the Priority picklist values of a Financial Goal.
- `FinancialGoalStatus` — Returns the Status picklist values of a Financial Goal.
- `FinancialGoalFrequency` (API version 60.0) — Returns the Frequency picklist values of a Financial Goal.
- `hasCreateAccessFinancialGoal` (API version 60.0) — Returns `true` if the user has Create access to the `FinancialGoal` object in their User Profile Standard Object Permissions.
- `hasEditAccessFinancialGoal` (API version 60.0) — Returns `true` if the user has Edit access to the `FinancialGoal` object in their User Profile Standard Object Permissions.
- `hasDeleteAccessFinancialGoal` (API version 60.0) — Returns `true` if the user has Delete access to the `FinancialGoal` object in their User Profile Standard Object Permissions.

args

Type: `Map<String, Object>`

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes.

None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCHouseholdService Class

Use the callable FSCHouseholdService class to accept a Person Account ID corresponding to a member of a Household and return the other Household members.

Namespace

[fschousehold](#)

Usage

The Financial Goals FlexCards use Integration Procedures that call the FSCHouseholdService class. These FlexCards display information about Financial Goals.

[FSCHouseholdService Methods](#)

The following are methods for `FSCHouseholdService`.

FSCHouseholdService Methods

The following are methods for `FSCHouseholdService`.

FSCHouseholdService is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available FSCHouseholdService actions and passes arguments to that action.

call(action, args)

This method calls one of the available FSCHouseholdService actions and passes arguments to that action.

API Version

59.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following action names:

- *getAllMembersOfAHousehold* — Accepts the accountId of a Person Account corresponding to a member of a Household and returns the other Household members.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes.

All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- *getAllMembersOfAHousehold*
 - *input* — Wrap the following arguments inside the input argument.
 - *accountId* — Maps to the accountId argument of the action being called.

Return Value

Type: Map<String, Object>

The return values of the corresponding action:

- *getAllMembersOfAHousehold* — Returns all members of the Household.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCPlansAndGoalsUtil Class

The FSCPlansAndGoalsUtil class provides utilities to the other Apex classes in the `fschousehold` namespace.

Namespace

[fschousehold](#)

[FSCPlansAndGoalsUtil Methods](#)

The following are methods for `FSCPlansAndGoalsUtil`.

FSCPlansAndGoalsUtil Methods

The following are methods for `FSCPlansAndGoalsUtil`.

Methods of other classes in the `fschousehold` namespace call methods in this class.

[getOrganizationId\(\)](#)

This method returns the Org ID as a String.

getPicklist(objectName, fieldName)

This method accepts an object name and picklist field and returns the picklist values.

isOrgPreferenceEnabled(orgId, orgPreference)

This method accepts Org ID and Org Preference values and returns `true` if the preference or permission is enabled in the org.

getOrganizationId()

This method returns the Org ID as a String.

API Version

60.0

Signature

```
public static String getOrganizationId()
```

Parameters

None

Return Value

Type: String

Returns the org ID.

getPicklist(objectName, fieldName)

This method accepts an object name and picklist field and returns the picklist values.

API Version

60.0

Signature

```
public static List<Map<String, String>> getPicklist(String objectName, String fieldName)
```

Parameters*objectName*

Type: String

The name of the object that contains the picklist field.

fieldName

Type: String

The name of the picklist field.

Return Value

Type: List<Map<String, String>>

Returns the values of the specified picklist field.

isOrgPreferenceEnabled(orgId, orgPreference)

This method accepts Org ID and Org Preference values and returns `true` if the preference or permission is enabled in the org.

API Version

60.0

Signature

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

Parameters

orgId

Type: String

The ID of the org.

orgPreference

Type: String

The name of the org preference or permission.

Return Value

Type: Boolean

Returns `true` if the preference or permission is enabled in the org.

FSCPlanService Class

Use the callable FSCPlanService class to return picklist values of a Financial Plan object.

Namespace

[fschousehold](#)

Usage

The Financial Plans FlexCards use Integration Procedures that call the FSCPlanService class. These FlexCards display information about Financial Plans.

[FSCPlanService Methods](#)

The following are methods for `FSCPlanService`.

FSCPlanService Methods

The following are methods for `FSCPlanService`.

`FSCPlanService` is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available `FSCPlanService` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `FSCPlanService` actions and passes arguments to that action.

API Version

60.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following action names:

- `FinancialPlanStatus` — Returns the Status picklist values of a Financial Plan.
- `FinancialPlanType` — Returns the Type picklist values of a Financial Plan.
- `IsOnDemandRollupRefreshEnabled` — Returns the boolean value which represent whether on demand data refresh is enabled or not.

`args`

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes.

None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

RetrievalSummaryDataRefresh Class

Use the callable `RetrievalSummaryDataRefresh` wrapper class to refresh `retrievalSummaryDefinition` associated rollups.

Namespace

[fshousehold](#)

Example

Refresh rollups that're associated with a retrieval summary definition.

- Invoke sync.

```
Map<String, Object> args = new Map<String, Object>();
Map<String, String> input = new Map<String, String>();
Map<String, Object> output = new Map<String, Object>();
input.put('AccountId', '001SG00000iDsGQYA0');
input.put('RetrievalSummaryDefinitionDeveloperName', 'HouseholdAPIForWealthManagement');
args.put('input', input);
args.put('output', output);
fshousehold.RetrievalSummaryDataRefresh dataRefreshWrapper = new
fshousehold.RetrievalSummaryDataRefresh();
dataRefreshWrapper.call('refreshRetrievalSummaryData', args);
System.debug(output);
```

- Get LastRefreshDetails.

```
Map<String, Object> args = new Map<String, Object>();
Map<String, String> input = new Map<String, String>();
Map<String, Object> output = new Map<String, Object>();
input.put('AccountId', '001SG00000iDsGQYA0');
input.put('RetrievalSummaryDefinitionDeveloperName', 'HouseholdAPIForWealthManagement');
args.put('input', input);
args.put('output', output);
fshousehold.RetrievalSummaryDataRefresh dataRefreshWrapper = new
fshousehold.RetrievalSummaryDataRefresh();
dataRefreshWrapper.call('fetchLastRefreshDetails', args);
System.debug(output);
```

[RetrievalSummaryDataRefresh Methods](#)

RetrievalSummaryDataRefresh is a callable class. Its only method is call.

RetrievalSummaryDataRefresh Methods

RetrievalSummaryDataRefresh is a callable class. Its only method is call.

The `RetrievalSummaryDataRefresh` class includes the `call` method.

`call(action, args)`

This method calls one of the available `RetrievalSummaryDataRefresh` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `RetrievalSummaryDataRefresh` actions and passes arguments to that action.

Signature

```
public Map<String, Object> call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of these action names:

- *refreshRetrievalSummaryData* — Refreshes the data of the retrieval summary definition name and account ID.
- *fetchLastRefreshDetails* — Fetches the last refresh date of the retrieval summary definition name and account ID.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. None of the actions require input, so for all actions, provide empty input, output, and options keys. Input and output are required. Input must have `AccountId` and `RetrievalSummaryDefinitionDeveloperName`. The output can be empty, but it can't be null.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

fscserviceprocesses Namespace

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.

 **Note:** The `fscserviceprocesses` namespace cannot be used in DML operations.

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

[AddressUpdateHelperFunctions Class](#)

The callable `AddressUpdateHelperFunctions` class provides data conversion functions for use in the Change Address OmniScript.

[FeeReversalHelperFunctions Class](#)

The callable `FeeReversalHelperFunctions` class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

AddressUpdateHelperFunctions Class

The callable `AddressUpdateHelperFunctions` class provides data conversion functions for use in the Change Address OmniScript.

Namespace

[fcserviceprocesses](#)

Usage

The AddressUpdateHelperFunctions class is a helper function for the GET and POST methods of the SvcCatalogRequest Connect API. The Change Address OmniScript calls Integration Procedures that call the AddressUpdateHelperFunctions methods via Remote Actions.

[AddressUpdateHelperFunctions Methods](#)

AddressUpdateHelperFunctions Methods

The following are methods for `AddressUpdateHelperFunctions`.

`call(action, args)`

This method calls one of the available AddressUpdateHelperFunctions actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available AddressUpdateHelperFunctions actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following:

- `getAddressUpdateAttrs` — Fetches the list of Service Process attributes for the Address Update request.
- `convertArrayToKeyValuePairs` — Converts the formats of Financial Account numbers.
- `ConvertToList` — Converts document type data to list format.
- `convertAndMergeAccounts` — Converts Financial Account data to list format.
- `convertUploadedDocuments` — Converts uploaded files metadata json for OS.
- `ifUploadContainsMultipleFiles` — Indicates if a single file input element in OS contains multiple uploads.
- `convertAddresses` — Converts the account level addresses to consumable format for the OmniScript.
- `callCreateCaseApi` — Creates a new Case and a related Service Process record with the address data.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- `getAddressUpdateAttrs`
 - String `svcCatalogRequestId` — Id of the request created using the Address Update OmniScript.

- *convertArrayToKeyValuePairs*
 - List<Object> financialAccountsObj — List of financial account objects for transformation.
- *ConvertToList*
 - Object args — String of comma-separated document types.
- *convertAndMergeAccounts*
 - List<Object> args — list of financial accounts.
- *convertUploadedDocuments*
 - List<Object> args — list of uploaded documents from the OmniScript data.
- *ifUploadContainsMultipleFiles*
 - List<Object> args — list of uploaded documents from the OmniScript data.
- *convertAddresses*
 - Map<String, Object> args — Account level addresses.
- *callCreateCaseApi*
 - Map<String, Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

convertArrayToKeyValuePairs

Input format:

```
[  
  {  
    "AccountName": "Priority Checking",  
    "Address1": "33 Ridgemond Street",  
    "City": "San Fransisco",  
    "FinancialAccountId": "a0FRN000000Dt6C2AS",  
    "PostalCode": "512534",  
    "Country": "United States",  
    "State": "CA",  
    "FinancialAccountNumber": "700021878"  
  },  
  {  
    "AccountName": "Cash Rewards Credit Card",  
    "Address1": "123 Main Street",  
    "City": "San Jose",  
    "FinancialAccountId": "a0FRN000000Dt6C2AS",  
    "PostalCode": "95125",  
    "Country": "United States",  
    "State": "CA",  
    "FinancialAccountNumber": "700021879"  
  }]
```

```

    "Address1": "91 Town Road",
    "City": "Naples",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "PostalCode": "514534",
    "Country": "United State",
    "State": "Florisa",
    "FinancialAccountNumber": "78000130"
},
{
    "AccountName": "Regular Savings",
    "Address1": "33 Ridgemond Street",
    "City": "San Fransisco",
    "FinancialAccountId": "a0FRN000000Dt7U2AS",
    "PostalCode": "51345",
    "Country": "United States",
    "State": "CA",
    "FinancialAccountNumber": "200048376"
}
]

```

Output format:

```

[
{
    "isSelected": null,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "City": "San Fransisco",
    "Address1": "33 Ridgemond Street",
    "AccountName": "Priority Checking"
},
{
    "isSelected": null,
    "ConvertedFinancialAccountNumber": "0130",
    "FinancialAccountNumber": "78000130",
    "State": "Florisa",
    "Country": "United State",
    "PostalCode": "514534",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "City": "Naples",
    "Address1": "91 Town Road",
    "AccountName": "Cash Rewards Credit Card"
},
{
    "isSelected": null,
    "ConvertedFinancialAccountNumber": "8376",
    "FinancialAccountNumber": "200048376",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "51345",
    "FinancialAccountId": "a0FRN000000Dt7U2AS",
}
]
```

```
        "City": "San Fransisco",
        "Address1": "33 Ridgemond Street",
        "AccountName": "Regular Savings"
    }
]
```

convertAndMergeAccounts

Input format:

```
[
  {
    "Id": "REC0",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "City": "San Fransisco",
    "Address1": "33 Ridgemond Street",
    "AccountName": "Priority Checking",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "0130",
    "FinancialAccountNumber": "78000130",
    "State": "Florisa",
    "Country": "United State",
    "PostalCode": "514534",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "City": "Naples",
    "Address1": "91 Town Road",
    "AccountName": "Cash Rewards Credit Card",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]
```

Output format:

```
[
  "700021878",
  "78000130"
]
```

convertAddresses

Input format:

```
{
  "Name": "Julia Green",
  "ShippingAddress": "33 Ridgemond Street, San Fransisco, CA, 613654, United States",
  "BillingAddress": "33 Ridgemond Street, San Fransisco, CA, 67136, United States"
}
```

Output format:

```
[
  {
    "isSelected": null,
    "type": "Shipping",
    "Address": "33 Ridgemond Street San Fransisco CA 613654 United States"
  },
  {
    "isSelected": null,
    "type": "Billing",
    "Address": "33 Ridgemond Street San Fransisco CA 67136 United States"
  }
]
```

convertUploadedDocuments

Input format:

```
[
  {
    "DocumentType-Block": {
      "DocumentType": "Passport"
    },
    "Files": [
      {
        "data": "069RN0000003301YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  },
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN0000003306YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  }
]
```

```

        ]
    }
]
```

Output format:

```
[
  {
    "typeId": "0deRN000000009UYAQ",
    "docType": "Passport",
    "name": "Passport.pdf",
    "id": "069RN0000003301YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN0000003306YAI"
  }
]
```

ifUploadContainsMultipleFiles

Input format:

```
[
  {
    "DocumentType-Block": {
      "DocumentType": "Passport"
    },
    "Files": [
      {
        "data": "069RN0000003301YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  },
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN0000003306YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  }
]
```

Output format: None

callCreateCaseApi

The input map contains these key-value pairs:

```
AddressLine1 (String): "32 baker street"
AddressLine2 (String): "abc"
PostalCode: 63164
City: "San Francisco"
State: "CA"
CountryCode: "United States"
accountId: "001RN0000037rzqYAA"
effectiveDate: "2022-12-31"
svcCatalogItemDefApiName: "AddressUpdate"
defaultAccountStatus:
caseSubject: "Address Update Service Request"
```

FinancialAccounts input format:

```
[
  {
    "Id": "REC0",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "City": "San Fransisco",
    "Address1": "33 Ridgemond Street",
    "AccountName": "Priority Checking",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "0130",
    "FinancialAccountNumber": "78000130",
    "State": "Florisa",
    "Country": "United States",
    "PostalCode": "514534",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "City": "Naples",
    "Address1": "91 Town Road",
    "AccountName": "Cash Rewards Credit Card",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]
```

customerLevelAddresses input format:

```
[
  {
    "Id": "REC0",
    "isSelected": true,
    "type": "Shipping",
    "Address": "33 Ridgemonad Street San Fransisco CA 613654 United State",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "type": "Billing",
    "Address": "33 Ridgemonad Street San Fransisco CA 67136 United State",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]
```

documentInfo input format:

```
[
  {
    "typeId": "0deRN00000009UYAQ",
    "docType": "Passport",
    "name": "Passport.pdf",
    "id": "069RN0000003301YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN0000003306YAI"
  }
]
```

Output format: None

FeeReversalHelperFunctions Class

The callable FeeReversalHelperFunctions class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

Namespace

[fscserviceprocesses](#)

Usage

The FeeReversalHelperFunctions class is a helper function for the GET and POST methods of the SvcCatalogRequest Connect API. The Fee Reversal OmniScript calls Integration Procedures that call the FeeReversalHelperFunctions methods via Remote Actions.

[FeeReversalHelperFunctions Methods](#)

The following are methods for `FeeReversalHelperFunctions`.

`call(action, args)`

This method calls one of the available FeeReversalHelperFunctions actions and passes arguments to that action.

call(action, args)

This method calls one of the available FeeReversalHelperFunctions actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following:

- `getFeeReversalAttributes` — Fetches the list of Service Process attributes for the Fee Reversal request.
- `callCreateCaseApi` — Creates a new Case and a related Service Process record with the transaction data.

`args`

Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- `getFeeReversalAttributes`
 - String caseld — Id of the Case created using the Fee Reversal OmniScript.
- `callCreateCaseApi`
 - Map<String, Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

getFeeReversalAttributes

Input format:

```
{"caseId": "500RM000003rQu1YAE"}
```

Output format:

```
{
  "caseRequestAttr": {
    "FinancialAccountId": "a0URM000004OCM2A2",
    "Transactions": [
      {
        "frt_reversal_transaction_description": "Reverse Cheque book charge",
        "frt_reversal_amount_currency": "USD",
        "frt_reversal_percentage": 100,
        "frt_transaction_id": "12",
        "frt_reversal_error_reason": null,
        "frt_override_percentage": 80,
        "frt_reversal_transaction_amount": 40,
        "groupCorrelationNumber": 1,
        "frt_transaction_code": "54",
        "frt_override_amount_currency": "USD",
        "frt_transaction_posted_date": "2022-11-11T12:53:14.000Z",
        "frt_fee_type": "Cheque book charge",
        "override_percentage_formatted": "80.0%",
        "frt_override_amount": 40,
        "frt_transaction_amount_currency": "USD",
        "frt_transaction_description": "Fee charge for Cheque book",
        "frt_reversal_transaction_posted_date": "2022-11-15T20:20:20.000Z",
        "reversal_percentage_formatted": "100.0%",
        "frt_transaction_amount": 50,
        "frt_reversal_amount": 50,
        "frt_reversal_transaction_id": "1001116623",
        "frt_reversal_transaction_amount_currency": null
      }
    ]
  }
}
```

callCreateCaseApi

Input format:

```
{
  "attributes": {
    "data": {
      "financial_account_id_1": {
        "label": "Financial Account ID 1"
      }
    }
  }
}
```

```
        "value": "accountId"
    },
    "source_system_id_1": {
        "value": "100"
    },
    "reversal_reason_1": {
        "value": null
    },
    "fee_reversal_transactions_1": {
        "value": [
            {
                "frt_transaction_id_1": "12",
                "frt_transaction_posted_date_1": "2022-11-11T12:53:14.924Z",
                "frt_transaction_amount_1": 50,
                "frt_transaction_amount_currency_1": "USD",
                "frt_fee_type_1": "Check book charge",
                "frt_transaction_code_1": "54",
                "frt_reversal_amount_currency_1": null,
                "frt_reversal_amount_1": null,
                "frt_reversal_percentage_1": null,
                "frt_override_amount_currency_1": null,
                "frt_override_amount_1": null,
                "frt_override_percentage_1": null,
                "frtr_transaction_id_1": null,
                "frtr_transaction_posted_date_1": null,
                "frtr_transaction_description_1": null,
                "frtr_transaction_amount_1": null,
                "frtr_transaction_amount_currency_1": null,
                "frtr_error_reason_1": null
            }
        ]
    },
    "reversal_summary_1": {
        "value": {
            "reversal_transaction_status_1": null
        }
    }
},
"svcCatalogItemDefApiName": "Fee_Reversal_Test_2",
"caseInfo": {
    "data": {
        "Subject": {
            "value": "Check book charge reversal"
        },
        "Origin": {
            "value": "Phone"
        }
    }
}
}
```

Output format:

```
{  
    "svcCatalogRequestId": "946xx000000009hEAA",  
    "caseId": "500xx00000cd69AAA",  
    "caseNumber": "00001032"  
}
```

fscwmgen Namespace

The `fscwmgen` namespace provides an interface used for Record Alerts.

 **Note:** The RecordAlertProvider namespace cannot be used in DML operations.

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

[RecordAlertActionInfo Class](#)

Represents information about the action taken on the record alert.

[RecordAlertInfo Class](#)

Represents details about the record alert.

[RecordAlertProvider Interface](#)

Implement this interface to provide record alerts and to perform actions on the record alerts.

[RecordAlertsWrapper Class](#)

Use the callable RecordAlertsWrapper class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

RecordAlertActionInfo Class

Represents information about the action taken on the record alert.

Namespace

[fscwmgen](#)

[RecordAlertActionInfo Properties](#)

RecordAlertActionInfo Properties

The following are properties for `RecordAlertActionInfo`.

`actionName`

The name of the action performed on a record alert.

`parameters`

List of parameters specified for the record alert action.

actionName

The name of the action performed on a record alert.

The following are the valid values:

- dismiss
- snooze

Signature

```
public String actionName {get; set;}
```

Property Value

Type: String

parameters

List of parameters specified for the record alert action.

The snooze action requires the `effectiveDate` parameter. The dismiss action requires no parameters.

Signature

```
public List<String> parameters {get; set;}
```

Property Value

Type: List<String>

RecordAlertInfo Class

Represents details about the record alert.

Namespace

[fscwmgen](#)

[RecordAlertInfo Properties](#)

RecordAlertInfo Properties

The following are properties for `RecordAlertInfo`.

[actionInfoList](#)

Details of an action taken on a record alert.

[categoryFullName](#)

The category name of the record alert.

description

The description of the record alert.

effectiveDate

The start date and time from when an active record alert is in effect.

isActive

Indicates whether a record alert is active or not.

parentId

The parent ID of the record alert.

severity

Indicates the degree of impact of the record alert.

sourceSystemId

The ID of the source system that this record alert was sourced from.

subject

The subject line of the record alert.

validUntilDate

The date and time from when a record alert is no longer valid.

whatId

The Salesforce object record ID on which a record alert is created.

actionInfoList

Details of an action taken on a record alert.

Signature

```
public List<fscwmgen.RecordAlertActionInfo> actionInfoList {get; set;}
```

Property Value

Type: List<[fscwmgen.RecordAlertActionInfo](#)>

categoryFullName

The category name of the record alert.

Signature

```
public String categoryFullName {get; set;}
```

Property Value

Type: String

description

The description of the record alert.

Signature

```
public String description {get; set;}
```

Property Value

Type: String

effectiveDate

The start date and time from when an active record alert is in effect.

Signature

```
public Datetime effectiveDate {get; set;}
```

Property Value

Type: Datetime

isActive

Indicates whether a record alert is active or not.

Signature

```
public Boolean isActive {get; set;}
```

Property Value

Type: Boolean

parentId

The parent ID of the record alert.

Signature

```
public String parentId {get; set;}
```

Property Value

Type: String

severity

Indicates the degree of impact of the record alert.

Signature

```
public String severity {get; set;}
```

Property Value

Type: String

sourceSystemId

The ID of the source system that this record alert was sourced from.

Signature

```
public String sourceSystemId {get; set;}
```

Property Value

Type: String

subject

The subject line of the record alert.

Signature

```
public String subject {get; set;}
```

Property Value

Type: String

validUntilDate

The date and time from when a record alert is no longer valid.

Signature

```
public Datetime validUntilDate {get; set;}
```

Property Value

Type: Datetime

whatId

The Salesforce object record ID on which a record alert is created.

Signature

```
public String whatId {get; set;}
```

Property Value

Type: String

RecordAlertProvider Interface

Implement this interface to provide record alerts and to perform actions on the record alerts.

Namespace

[fscwmgen](#)

[RecordAlertProvider Methods](#)

[RecordAlertProvider Example Implementation](#)

RecordAlertProvider Methods

The following are methods for RecordAlertProvider.

[dismissAlert\(var1\)](#)

Use this method to dismiss the record alert.

[getAlertsByParentId\(var1\)](#)

Retrieve record alerts by the parent ID.

[getAlertsByWhatId\(var1\)](#)

Retrieve record alerts by the Salesforce object record ID.

[getAlertsByWhatIdAndParentId\(var1, var2\)](#)

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

[snoozeAlert\(var1, var2\)](#)

Use this method to snooze the record alert.

dismissAlert (var1)

Use this method to dismiss the record alert.

Signature

```
public fscwmgen.RecordAlertInfo dismissAlert(String var1)
```

Parameters

var1

Type: String

Specify the action value as `Dismiss`.

Return Value

Type: [fscwmgen.RecordAlertInfo](#)

getAlertsByParentId(var1)

Retrieve record alerts by the parent ID.

 **Note:** This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByParentId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String var1)
```

Parameters

var1

Type: String

Specify the parent ID.

Return Value

Type: List<[fscwmgen.RecordAlertInfo](#)>

getAlertsByWhatId(var1)

Retrieve record alerts by the Salesforce object record ID.

 **Note:** This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByWhatId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String var1)
```

Parameters

var1

Type: String

Specify the Salesforce record ID.

Return Value

Type: List<[fscwmgen.RecordAlertInfo](#)>

getAlertsByWhatIdAndParentId(var1, var2)

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

 **Note:** This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByWhatId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

It returns alerts in the following basic structure for `whatId` and `parentid`.

What Id	Parent Id	Subject	Description
Person AccountId	null	Text1	Text2
Financial AccountId	null	Text3	Text4
Financial TransactionId	Financial AccountId	Text5	Text6

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String var1, String var2)
```

Parameters

`var1`
Type: String

Specify the related parent ID.

`var2`
Type: String

Specify the Salesforce record ID.

Return Value

Type: List<[fscwmgen.RecordAlertInfo](#)>

snoozeAlert(var1, var2)

Use this method to snooze the record alert.

Signature

```
public fscwmgen.RecordAlertInfo snoozeAlert(String var1, Datetime var2)
```

Parameters

`var1`
Type: String

Specify the action value as `Dismiss`.

`var2`
Type: Datetime

Specify the snooze date for the record alert to reappear after the specified time period.

Return Value

Type: [fscwmgen.RecordAlertInfo](#)

RecordAlertProvider Example Implementation

This is an example implementation of the `fscwmgen.RecordAlertProvider` interface.

The following example tests the implementation:

```
global class CoreBankingAlertProvider implements fscwmgen.RecordAlertProvider {

    public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String whatId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_whatId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
        JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
        // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
            fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, null);
            newAlerts.add(newAlert);
        }

        // Return the list of alerts
        return newAlerts;
    }

    public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String parentId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_parentId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
        JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
        // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
            // Retrieve whatId for this specific alert. Can be queried from Salesforce or
            // provided by CoreBanking.
            String whatId = retrieveWhatId();
            fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, parentId);
            newAlerts.add(newAlert);
        }
    }
}
```

```
// Return the list of alerts
return newAlerts;
}

public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String whatId,
String parentId) {
    HttpRequest req = new HttpRequest();
    // This callout is specific to the Core banking.
    req.setEndpoint('callout:My_Named_Credential/get_by_whatId_and_parentId');
    req.setMethod('GET');
    Http http = new Http();
    HTTPResponse res = http.send(req);
    Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    List<Object> results = (List<Object>) jsonResp.get('results');

    List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
    // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

    for(CoreBankingResult res : results){
        fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, parentId);
        newAlerts.add(newAlert);
    }

    // Return the list of alerts
    return newAlerts;
}

public fscwmgen.RecordAlertInfo snoozeAlert(String alertId, Datetime snoozeUntilDate){

    HttpRequest req = new HttpRequest();
    // This callout is specific to the Core banking.
    req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
    req.setMethod('GET');
    Http http = new Http();
    HTTPResponse res = http.send(req);
    // Perform error handling on response. Below code is when the response is valid.
    Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    List<Object> results = (List<Object>) jsonResp.get('results');
    // Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
    String whatId = results.get(0).getId();
    return convertCoreBankingAlertToSalesforceAlert(results.get(0));
}

public fscwmgen.RecordAlertInfo dismissAlert(String alertId) {
    HttpRequest req = new HttpRequest();
    // This callout is specific to the Core banking.
    req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
    req.setMethod('GET');
    Http http = new Http();
```

```
HTTPResponse res = http.send(req);
// Perform error handling on response. Below code is when the response is valid.
Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
List<Object> results = (List<Object>) jsonResp.get('results');
// Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
String whatId = results.get(0).getId();
return convertCoreBankingAlertToSalesforceAlert(results.get(0));
}

private RecordAlertInfo convertCoreBankingAlertToSalesforceAlert(CoreBankingResult
alert, String whatId, String parentId) {
    fscwmgen.RecordAlertInfo newAlert = new fscwmgen.RecordAlertInfo();
    newAlert.subject = alert.getSubject();
    newAlert.description = alert.getDescription();
    newAlert.sourceSystemId = alert.getId();
    newAlert.parentId = parentId;
    newAlert.whatId = whatId;
    // This could also use conversion from Core Banking category to salesforce
    RecordAlertCategory
    newAlert.categoryFullName = 'Fraud';

    newAlert.actionInfoList = new List<fscwmgen.RecordAlertActionInfo>();
    // snooze Action
    fscwmgen.RecordAlertActionInfo snooze = new fscwmgen.RecordAlertActionInfo();
    snooze.actionName = 'snooze';
    snooze.parameters = new List<String>();
    // SnoozeUntilDate is required parameter
    snooze.parameters.add('snoozeUntilDate');
    newAlert.actionInfoList.add(snooze);

    // Dismiss Action
    fscwmgen.RecordAlertActionInfo dismiss = new fscwmgen.RecordAlertActionInfo();
    dismiss.actionName = 'dismiss';
    newAlert.actionInfoList.add(dismiss);

    return newAlert;
}
}
```

RecordAlertsWrapper Class

Use the callable RecordAlertsWrapper class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

Namespace

[fscwmgen](#)

Usage

The ServiceExcellenceAlertCard and ServiceExcellenceGenericAlertCard have Integration Procedure data sources that call the RecordAlertsWrapper class. These FlexCards display information about financial accounts.

[RecordAlertsWrapper Methods](#)

RecordAlertsWrapper Methods

The following are methods for `RecordAlertsWrapper`.

`call(action, args)`

This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following:

- `getAlertsByWhatId` — Returns all active Record Alerts with the specified Id, where SnoozeUntilDate < now < ValidUntilDate.
- `getAlertsByWhatIdBatch` — Returns all active record alerts with one of the specified Ids, where SnoozeUntilDate < now < ValidUntilDate.
- `snoozeAlert` — Snoozes the Record Alert with the specified Id until the snoozeUntilDate value.
- `dismissAlert` — Dismisses the record alert with the specified Id by setting the isActive field to false.

`args`

Type: Map<String, Object>

The arguments passed to the corresponding action:

- `getAlertsByWhatId`
 - String Id — The Id of the what Id field to fetch Record alerts.
 - boolean IsFSC — Set to true to group results by Financial Account and Record Alert Category.
 - int Limit — Maximum number of alerts to return. Allowed values are 1-20.
 - int childLimit — Maximum number of aggregated alerts to return. Allowed values are 1-10.
- `getAlertsByWhatIdBatch`
 - List<String> Ids — The Ids of the what Id field to fetch Record alerts.

- boolean `IsFSC` — Set to true to group results by Financial Account and Record Alert Category.
- int `Limit` — Maximum number of alerts to return. Allowed values are 1-20.
- int `childLimit` — Maximum number of aggregated alerts to return. Allowed values are 1-10.
- `snoozeAlert`
 - String `Id` — The id of the Record Alert to snooze.
 - Date `snoozeUntilDate` — The date at which the Record Alert is no longer snoozed.
- `dismissAlert`
 - String `Id` — The id of the record alert to dismiss.

Return Value

The data returned by `getAlertsByWhatId` and `getAlertsByWhatIdBatch` looks like this:

```
{  
  "numAlerts": 2,  
  "groupedAlerts": [  
    {  
      "Subject": "Sample Alert",  
      "Description": "Sample Description",  
      "WhatId": "0x0000002c4d4eM",  
      "StartDate": "2022-11-30T15:05:47",  
      "ValidUntilDate": "2023-11-30T15:05:47",  
      "SnoozeUntilDate": "2022-12-05T15:05:47"  
    }  
  ],  
  "alerts": [  
    {  
      "Subject": "Sample Alert",  
      "Description": "Sample Description",  
      "WhatId": "0x0000002c4d4eM",  
      "StartDate": "2022-11-30T15:05:47",  
      "ValidUntilDate": "2023-11-30T15:05:47",  
      "SnoozeUntilDate": "2022-12-05T15:05:47"  
    }  
  ]  
}
```

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

industriespersonalizedfinance Namespace

The `industriespersonalizedfinance` namespace classes provide data helper functions for use in personalized finance.

 **Note:** The `industriespersonalizedfinance` namespace cannot be used in DML operations.

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

[CDPQuery Class](#)

Use the callable CDPQuery class to provide data helper functions for use in the Cash Flow FlexCard.

[FSCPersonalizedFinanceUtil Class](#)

Use the callable FSCPersonalizedFinanceUtil class to provide data helper functions for income and expense data in the Cash Flow FlexCard.

CDPQuery Class

Use the callable CDPQuery class to provide data helper functions for use in the Cash Flow FlexCard.

Namespace

[industriespersonalizedfinance](#)

[CDPQuery Methods](#)

The following are methods for `CDPQuery`.

CDPQuery Methods

The following are methods for `CDPQuery`.

`CDPQuery` is a callable class. Its only method is `call`.

[call\(action, args\)](#)

This method calls one of the available `CDPQuery` actions and passes arguments to that action.

call(action, args)

This method calls one of the available `CDPQuery` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following actions:

- `getCalculatedInsight` — Invokes the [queryCalculatedInsights](#) method of the `CdpQuery` Apex class, specifying only the `ciName`, `orderBy`, and `filters` parameters.
- `hasRecordAccess` — Returns true if the current user has access to the specified Account.
- `isPersonAccount` — Returns true if the specified Account is a Person Account.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- *getCalculatedInsight* — Accepts calculatedInsightName, orderBy, and filters keys.
- *hasRecordAccess* — Accepts an AccountId.
- *isPersonAccount* — Accepts an AccountId.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *getCalculatedInsight* — Returns the data property from a [CdpQueryOutput](#) object under the calculatedInsightData key.
- *hasRecordAccess* — Returns true in the hasRecordAccess key if the current user has access to the specified Account. Returns an additional errorMessage key if hasRecordAccess is false.
- *isPersonAccount* — Returns true in the isPersonAccount key if the specified Account is a Person Account. Returns an additional errorMessage key if isPersonAccount is false.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCPersonalizedFinanceUtil Class

Use the callable FSCPersonalizedFinanceUtil class to provide data helper functions for income and expense data in the Cash Flow FlexCard.

Namespace

[industriespersonalizedfinance](#)

[FSCPersonalizedFinanceUtil Methods](#)

The following are methods for `FSCPersonalizedFinanceUtil`.

FSCPersonalizedFinanceUtil Methods

The following are methods for `FSCPersonalizedFinanceUtil`.

`FSCPersonalizedFinanceUtil` is a callable class. Its only method is `call`.

`call(action, args)`

This method calls one of the available `FSCPersonalizedFinanceUtil` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `FSCPersonalizedFinanceUtil` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The only action is `getIncomeExpenseCategories`.

- `getIncomeExpenseCategories` — Retrieves categorized income or expenses to populate the Income or Expenses pie chart in the Cash Flow FlexCard.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- `getIncomeExpenseCategories` — Accepts an Option argument, set to Income or Expense, followed by an Income or Expense list, as in the following examples. This Option argument is different from the standard options argument, which is empty for this action.

Income example:

```
{
  "Option": "Income",
  "Income": [
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Salary",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    },
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Salary",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    },
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Bonus",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    }
  ]
}
```

Expenses example:

```
{  
    "Option": "Expenses",  
    "Income": [  
        {  
            "FinancialAccountId__c": "a0USB0000005xYv2AI",  
            "PartyId__c": "001SB000003ECqnYAG",  
            "PartyName__c": "Simon Maurice",  
            "TransactionCategory__c": "Car Payment",  
            "TotalExpensesByCategory__c": 10000,  
            "FinancialAccountName__c": "Simon Checking"  
        }  
    ]  
}
```

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *getIncomeExpenseCategories* — Returns total income or expenses under the TotalAmount key and categorized amounts and percentages under the Data key, as in the following example. If there are more than five categories, the sixth and subsequent categories are grouped.

```
{  
    "TotalAmount": 15000,  
    "Data": [  
        {  
            "Amount": 10000,  
            "Category": "Salary $10000 (67%)"  
        },  
        {  
            "Amount": 5000,  
            "Category": "Bonus $5000 (33%)"  
        }  
    ]  
}
```

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FINANCIAL SERVICES CLOUD BUSINESS APIs

Financial Services Cloud Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

[REST Reference](#)

You can access Financial Services Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

[REST Reference](#)

You can access Financial Services Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

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

[Resources](#)

Here's a list of Financial Services Cloud Business API resources.

[Request Bodies](#)

Here's a list of Financial Services Cloud Business API request bodies.

[Response Bodies](#)

Here's a list of Financial Services Cloud Business API response bodies.

[Resources](#)

Here's a list of Financial Services Cloud Business API resources.

[Application Mapper](#)

Create financial accounts and related records from a residential loan application.

[Bulk Record Alerts \(Financial Accounts\)](#)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

[Bulk Record Alerts \(Person Accounts\)](#)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

[Dispute Management Ethoca Alert Callback](#)

Send an Ethoca alert callback for transaction dispute management.

[Financial Goals](#)

Create financial goals, goal members, and goal funding.

[Financial Goal Update](#)

Update a financial goal and its members and funding.

[Financial Goals Query](#)

Query financial goals, goal members, and goal funding using the parent Person Account, Household, or Party Relationship Group record.

[Mortgage Application](#)

Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalId` of an external system to get a mortgage application.

[Mortgage Applications](#)

Create mortgage applications using the POST method.

[Public Complaint](#)

Create a customer complaint.

[Record Alerts \(Financial Accounts\)](#)

Retrieve a list of active record alerts on financial accounts.

[Record Alerts \(Person Accounts\)](#)

Retrieve a list of active record alerts on person accounts.

[Retrieval Summary](#)

Get the data of a retrieval summary definition by using the root record ID and the retrieval summary definition ID.

Application Mapper

Create financial accounts and related records from a residential loan application.

Resource

```
/connect/financialservices/mapper
```

Available version

49.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{  
  "recordId": "0cdB0000000CbVGIA0"  
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordId	String	ID of the residential loan application.	Required	49.0

Response example

```
{  
  "result": {  
    "assetsAndLiabilities": [  
      "a03B000000735LwIAI",  
      "a03B000000735LxIAI",  
      "a03B000000735LyIAI"  
    ],  
    "customerProperties": [  
      "0b8B000000GnjdIAC"  
    ],  
    "errors": [],  
    "financialAccounts": [  
      "a0EB000000227WtMAI",  
      "a0EB000000227WuMAI",  
      "a0EB000000227WvMAI"  
    ],  
    "personAccounts": [  
      "001B000001K8Zx5IAF"  
    ],  
    "status": "SUCCESS"  
  }  
}
```

Response body for POST

[Mapper Result Representation](#) on page 1166

Bulk Record Alerts (Financial Accounts)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

You can retrieve these alerts for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?  
financialAccountIds=0x3R0000026YJ8uIAG,0x3R0000026YJ8uIAG,0x3Dx00000004X2F
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
financialAccountIds	String[]	The IDs of the financial account records on which record alerts are created.	Required	55.0

Response body for GET[Record Alert Collection Map](#)**Bulk Record Alerts (Person Accounts)**

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

You can retrieve these alerts for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
personIds=001R0000026YJ8uIAG,001R0000026YJ8uIAG,001x00000004
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
personIds	String[]	The IDs of the person records on which record alerts are created.	Required	55.0

Response body for GET[Record Alert Collection Map](#)**Dispute Management Ethoca Alert Callback**

Send an Ethoca alert callback for transaction dispute management.

Resource

```
/connect/dispute-management/third-party/ethoca/alert-callback
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "ethocaInputPayload": {
    "events": [
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"
        }
      },
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876365",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876365"
        }
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
ethocaInputPayload	Ethoca Event on page 1114	Ethoca event input payload.	Required	60.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
disputeManagementRequestData	Object	Top-level parameter for dispute management request data.	Required	60.0

Response body for POST[Ethoca Alert Callback Output](#)

Financial Goals

Create financial goals, goal members, and goal funding.

Resource

```
/connect/financialplanning/financialgoals
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

In this example, `carType` and `role` are custom fields.

```
{
  "financialGoals": [
    {
      "financialGoal": {
        "actualAmount": "$1000.00",
        "completionDate": "2024-05-01",
        "initialAmount": "$500.00",
        "description": "Car for commuting",
        "priority": "P1",
        "startDate": "2023-05-01",
        "status": "InProgress",
        "targetAmount": "$50000.00",
        "targetDate": "2024-05-01",
        "name": "Goal1",
        "type": "Auto",
        "customFields": {
          "carType": "New luxury car"
        }
      },
      "financialGoalParties": [
        {
          "accountId": "001xx000003GYyJAAW",
          "customFields": {
            "role": "Auto purchaser"
          }
        },
        {
          "accountId": "001xx000005dJCxYAM",
          "customFields": {
            "role": "Auto purchaser partner"
          }
        }
      ]
    }
  ]
}
```

]}
}]
}

Properties

Name	Type	Description	Required or Optional	Available Version
financialGoals	Financial Goal Create Input 	List of goals and goal members to be created.	Required	59.0

Response body for POST

Financial Goals Create Output

Financial Goal Update

Update a financial goal and its members and funding.

Resource

/connect/financialplanning/financialgoals/**goalId**

Available version

59.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

JSON example

In this example, carType, role, and FSC9__FinancialAccount__c are custom fields.

```
    "financialGoal": {
        "completionDate": "2024-06-01",
        "description": "Cars for commuting",
        "targetAmount": "$55000.00",
        "targetDate": "2024-06-01",
        "customFields": {
            "carType": "New luxury car and used car"
        }
    },
    "addFinancialGoalParties": [
        {
            "accountId": "001xx000003GYyJAAV",
            "customFields": {
                "role": "Auto purchaser daughter"
            }
        }
    ]
}
```

```

        }
    ],
    "addFinancialGoalFundings": [
        {
            "amount": 2000,
            "currencyIsoCode": "USD",
            "customFields": {
                "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
            }
        }
    ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addFinancialGoalFundings	Financial Goal Funding Input []	Financial Accounts to be added to the Financial Goal.	Optional	60.0
addFinancialGoalParties	Financial Goal Party Input []	Goal members to be added to the Financial Goal.	Optional	59.0
financialGoal	Financial Goal Input	Financial Goal data.	Required for 59.0, Optional for 60.0	59.0
removeFinancialGoalFundings	Financial Goal Funding Input []	Financial Accounts to be removed from the Financial Goal.	Optional	60.0
removeFinancialGoalParties	Financial Goal Party Input []	Goal members to be removed from the Financial Goal.	Optional	59.0

Response body for PATCH

[Financial Goal Patch Output](#)

Financial Goals Query

Query financial goals, goal members, and goal funding using the parent Person Account, Household, or Party Relationship Group record.

Resource

`/connect/financialplanning/financialgoals/query/parentRecordId`

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "financialGoalFields": [
    "Name",
    "Description",
    "ActualAmount",
    "CompletionDate"
  ],
  "financialGoalPartyFields": [
    "AccountId",
    "Account.Name"
  ],
  "filterCriteria": [
    {
      "fieldName": "FinancialGoal.Type",
      "operator": "equals",
      "value": "Retirement"
    }
  ],
  "offset": 1,
  "limit": 10,
  "sortBy": "DESC",
  "orderBy": "FinancialGoal.Name"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
filterCriteria	Filter Criteria[]	Filter criteria for the results.	Optional	59.0
financialGoalFields	String[]	List of developer names of the fields from the FinancialGoal object to be retrieved.	Required for 59.0, Optional for 60.0	59.0
financialGoalFundingFields	String[]	List of field developer names from the FinancialAccount object to be retrieved.	Optional	60.0
financialGoalPartyFields	String[]	List of field developer names from the FinancialGoalParty object to be retrieved.	Optional	59.0
limit	Integer	Maximum number of financial goals returned in each response.	Optional	59.0
offset	Integer	Offset for paging through returned financial goals.	Optional	59.0
orderBy	String	Fully qualified developer name of the field used to sort the results.	Optional	59.0
sortBy	String	Sort the results by	Optional	59.0
		Asc		

Name	Type	Description	Required or Optional	Available Version
		or Desc order.		

Response body for POST

[Financial Goals List Output](#)

Mortgage Application

Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalId` of an external system to get a mortgage application.

Resource

`/connect/financialservices/mortgages/loanId`

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see [Connect to Connect REST API Using OAuth](#).

HTTP methods

GET, PATCH

Path Parameters

Parameter Name	Type	Description	Required	Available version
<code>loanId</code>	String	<code>id</code> or <code>externalId</code> associated with a loan application.	Yes	48.0

Request body JSON Example

```
{
  "amortizationTerm": 30
}
```

Response body for GET and PATCH

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
result	Mortgage Information Output []	Data of the mortgage result.	Small, 48.0	48.0

Sample response body for GET and PATCH

```
{
  "result" : {
    "accountId" : "001RM000004Xra2YAC",
    "assets" : [ ],
    "borrowers" : [ ],
    "createdById" : "005RM000001vbghYAA",
    "createdDate" : "2019-11-06T19:29:10.000Z",
    "extendedFields" : [ ],
    "externalId" : "tt2",
    "financials" : [ ],
    "hasOtherLoanFeature" : false,
    "hasPrepaymentPenalty" : false,
    "id" : "0cdRM00000000n5YAA",
    "isBalloon" : false,
    "isBorrowerInCommunityPropState" : false,
    "isConstructionToPermanent" : false,
    "isContractForDeed" : false,
    "isDeleted" : false,
    "isEnergyRelatedImprovement" : false,
    "isInterestOnly" : false,
    "isNegativeAmortization" : false,
    "isPropInCommunityPropState" : false,
    "isRenovation" : false,
    "isSingleClosing" : false,
    "isSubjectToPriorityLien" : false,
    "isTempIntRateBuydown" : false,
    "lastModifiedById" : "005RM000001vbghYAA",
    "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
    "lastReferencedDate" : "2019-11-06T19:35:31.000Z",
    "lastViewedDate" : "2019-11-06T19:35:31.000Z",
    "liabilities" : [ ],
    "name" : "tt2",
    "ownerId" : "005RM000001vbghYAA",
    "properties" : [ ],
    "systemModstamp" : "2019-11-06T19:31:07.000Z",
    "titleHolders" : [ {
      "createdById" : "005RM000001vbghYAA",
      "createdDate" : "2019-11-06T19:29:10.000Z",
      "extendedFields" : [ ],
      "externalId" : "ttl",
      "id" : "0cTRM000000009e2AA",
      "isCurrentTitleHolder" : false,
      "isDeleted" : false,
      "lastModifiedById" : "005RM000001vbghYAA",
      "lastModifiedDate" : "2019-11-06T19:31:07.000Z"
    } ]
  }
}
```

```
        "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
        "lastReferencedDate" : "2019-11-06T19:31:07.000Z",
        "lastViewedDate" : "2019-11-06T19:31:07.000Z",
        "loanApplicationId" : "0cdRM00000000n5YAA",
        "name" : "tt2",
        "systemModstamp" : "2019-11-06T19:31:07.000Z"
    } ]
}
}
```

Mortgage Applications

Create mortgage applications using the POST method.

A single API call lets you:

- Create records for objects like `ResidentialLoanApplication`, `LoanApplicant` `LoanApplicantAddress`, `LoanApplicantAsset`, `LoanApplicantDeclaration`, `LoanApplicantEmployment`, `LoanApplicantIncome`, `LoanApplicantLiability`, `LoanApplicationAsset`, `LoanApplicationFinancial`, `LoanApplicationLiability`, `LoanApplicationProperty`, and `LoanApplicationTitleHolder`.
- Add your org's custom fields with the `extendedFields` property for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders information.
- Use IDs from external systems with the `externalId` parameter for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders.

Resource

```
/connect/financialservices/mortgages
```

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see Connect to Connect REST API Using OAuth.

HTTP methods

POST

Request body

JSON example

```
{
    "accountId": "001RM000004XraFYAS",
    "amortizationTerm": 30,
    "amortizationType": "Adjustable Rate",
    "assets": [
        {
            "accountNumber": "849393",
            "accountType": "Checking",
            "assetClass": "Financial",
            "assetType": "Earnest Money",
            "borrowersExternalIds": [
                "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
                "0fc5e4d6-de5d-4954-9d21-3c628ad8809b"
            ]
        }
    ]
}
```

```
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "cashOrMarketValue": 434934903,
    "dispositionType": "Pending Sale",
    "extendedFields": [],
    "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "financialInstitutionName": "BOFA",
    "grossMonthlyRentalIncome": 355395355,
    "name": "Asset1",
    "netMonthlyRentalIncome": 2535345,
    "presentMarketValue": 7937399,
    "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
    },
    "realEstateMonthlyExpense": 3413131
},
{
    "accountNumber": "2424242424",
    "accountType": "Checking",
    "assetClass": "Real Estate",
    "assetType": "Earnest Money",
    "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "cashOrMarketValue": 24424525,
    "dispositionType": "Sold",
    "extendedFields": [],
    "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
    "financialInstitutionName": "wells",
    "grossMonthlyRentalIncome": 24242224,
    "name": "Asset2",
    "netMonthlyRentalIncome": 242424234,
    "presentMarketValue": 2423131313,
    "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
    },
    "realEstateMonthlyExpense": 2242423424
}
],
"balloonTermMonths": 3,
"borrowers": [
{
    "addresses": [
        {
            "addressOwnership": "Own",
            "extendedFields": [],
            "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
            "monthlyRentPayment": 2300,
            "name": "Addr1",
            "street": "123 2nd Street"
        }
    ],
    "name": "John Doe"
}
]
```

```
"residenceAdditionalMonthCount": 23,
"residenceAddress": {
    "city": "San Francisco",
    "country": "United States",
    "postalCode": "94105",
    "state": "CA",
    "street": "50 Fremont Street"
},
"residenceYearCount": 3,
"residencyType": "Former Residence"
},
],
"asianRaceSubType": "Asian Indian",
"borrowerType": "Borrower",
"citizenshipStatus": "U.S. Citizen",
"declarations": [
{
    "bankruptcyType": "Chapter 11",
    "borrowedAmount": 20000,
    "extendedFields": [],
    "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
    "hasBorrowedMoney": true,
    "hasCoSignerUndisclosedDebt": true,
    "hasDeclaredBankruptcy": true,
    "hasDeedSurrender": true,
    "hasOutstandingJudgement": true,
    "hasOwnershipInterest": true,
    "hasPastShortSale": true,
    "hasPropertyForeclosed": true,
    "hasUndisclosedAddCreditApp": true,
    "hasUndisclosedOtherPropLoan": true,
    "isPartyToLawsuit": true,
    "isPresentlyDelinquent": true,
    "isPrimaryResidence": true,
    "isRelatedToSeller": true,
    "name": "Decl1",
    "priorPropertyTitleType": "Yourself",
    "priorPropertyUsageType": "Secondary Residence"
}
],
"dependentCount": 2,
"dependentsAge": "25,34",
"employments": [
{
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 4,
    "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
    },
    "extendedFields": []
},
```

```
        "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
        "isRelToTransactionParty": true,
        "isLessThanQuarterShare": true,
        "isSelfEmployed": true,
        "jobTitle": "developer",
        "monthlyBaseIncomeAmount": 2300,
        "monthlyBonusAmount": 100,
        "monthlyCommissionAmount": 10,
        "monthlyIncome": 5000,
        "monthlyMilitaryEntitlementAmt": 20,
        "monthlyOtherIncomeAmount": 10,
        "monthlyOvertimeAmount": 200,
        "name": "Emp1",
        "startDate": "2019-10-10T03:11:27.000Z"
    },
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Not Hispanic or Latino",
"extendedFields": [],
"externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
{
    "extendedFields": [],
    "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
    "incomeSourceType": "Capital Gains",
    "monthlyIncomeAmount": 100,
    "name": "Income1"
},
],
"isActiveMilitary": true,
"isJointCredit": true,
"isSurvivingMilitarySpouse": true,
"maritalStatus": "Married",
"militaryTourExpirationMonth": 2,
"militaryTourExpirationYear": 2027,
"name": "BR1",
"otherAsianRaceSubType": "Indian",
"otherEthnicitySubType": "Mexico",
"otherPacIslandSubType": "Test Pacific Islander",
"pacificIslanderSubType": "Native Hawaiian",
"preferredLanguage": "English",
"raceType": "Asian",
"tribeName": "Pacific Islander",
"wasActiveMilitary": true,
"wasNonActivatedService": true
},
{
    "addresses": [
{
    "addressOwnership": "Rent",
    "extendedFields": [],
    "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
    "name": "Address1"
}
]
}
```

```
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94115",
            "state": "CA",
            "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
    }
],
"asianRaceSubType": "Asian Indian",
"borrowerType": "CoBorrower",
"citizenshipStatus": "U.S. Citizen",
"declarations": [
    {
        "bankruptcyType": "Chapter 12",
        "borrowedAmount": 657575,
        "extendedFields": [],
        "externalId": "704e7cf8-932c-4a17-81ad-844fe1a007c6",
        "hasBorrowedMoney": true,
        "hasCoSignerUndisclosedDebt": true,
        "hasDeclaredBankruptcy": true,
        "hasDeedSurrender": true,
        "hasOutstandingJudgement": true,
        "hasOwnershipInterest": true,
        "hasPastShortSale": true,
        "hasPropertyForeclosed": true,
        "hasUndisclosedAddCreditApp": true,
        "hasUndisclosedOtherPropLoan": true,
        "isPartyToLawsuit": true,
        "isPresentlyDelinquent": true,
        "isPrimaryResidence": true,
        "isRelatedToSeller": true,
        "name": "Decl1",
        "priorPropertyTitleType": "Yourself",
        "priorPropertyUsageType": "Primary Residence"
    }
],
"dependentCount": 2,
"dependentsAge": "34,35",
"employments": [
    {
        "currentJobAdditionalMonthCount": 24,
        "currentJobYearCount": 3,
        "employerAddress": {
            "city": "Fresno",
            "country": "United States",
            "postalCode": "93721",
            "state": "CA",
            "street": "2300 Stockton Street"
        }
    }
]
```

```
        },
        "extendedFields": [],
        "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
        "isRelToTransactionParty": true,
        "isLessThanQuarterShare": true,
        "isSelfEmployed": true,
        "jobTitle": "developer",
        "monthlyBaseIncomeAmount": 2400,
        "monthlyBonusAmount": 234,
        "monthlyCommissionAmount": 10,
        "monthlyIncome": 45668,
        "monthlyMilitaryEntitlementAmt": 20,
        "monthlyOtherIncomeAmount": 394,
        "monthlyOvertimeAmount": 123,
        "name": "Empl2",
        "startDate": "2019-10-10T03:11:27.000Z"
    }
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Hispanic or Latino",
"extendedFields": [],
"externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
    {
        "extendedFields": [],
        "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
        "incomeSourceType": "Child Support",
        "monthlyIncomeAmount": 200,
        "name": "Income1"
    }
],
"isActiveMilitary": true,
"isJointCredit": true,
"isSurvivingMilitarySpouse": true,
"maritalStatus": "Married",
"militaryTourExpirationMonth": 3,
"militaryTourExpirationYear": 2029,
"name": "COB1",
"otherAsianRaceSubType": "South india",
"otherEthnicitySubType": "Mexico",
"otherPacIslandSubType": "Test pacific Islander",
"pacificIslanderSubType": "Guamanian or Chamorro",
"preferredLanguage": "English",
"raceType": "American Indian or Alaska Native",
"tribeName": "Pacific Islander",
"wasActiveMilitary": true,
"wasNonActivatedService": true
}
],
"estateHoldType": "Fee Simple",
"extendedFields": [],
"externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
```

```
"financials": [
  {
    "borrowerClosingCostAmt": 95956,
    "counselingAgencyProviderName": "Test provider",
    "counselingCompleteBorrName": "BR1",
    "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
    "creditFromSeller": 33342,
    "discountPointCostAmount": 59586,
    "estFirstMortgagePayment": 459677,
    "estHomeownerInsurancePayment": 35521,
    "estMortgageInsurancePayment": 2424555,
    "estOtherDuesPayment": 24354,
    "estOtherPayment": 323231,
    "estPropertyTaxesPayment": 422556,
    "estSubordinateLienPayment": 35453,
    "estSuppPropInsurancePayment": 44959,
    "extendedFields": [],
    "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
    "financeMortgageInsuranceAmt": 353,
    "hasCompletedCounseling": true,
    "hasHomeownerEducation": true,
    "homeEdCompletedBorrowerName": "BR1",
    "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
    "homeownerEdFormat": "Attended Workshop in Person",
    "housingCounselingFormat": "Face-to-Face",
    "hudApproveAgencyId": "12344",
    "hudApprovedProviderId": "3532",
    "landAcquiredSeparatelyAmount": 2040,
    "loanAmtExclFinMortgageInsurance": 33345,
    "name": "Fin1",
    "otherCredit": 2242,
    "otherNewMortgageLoanAmt": 253535,
    "outstandingLoanAmount": 24505056,
    "purchasePriceAmount": 150000,
    "remodelAndRepairsAmount": 3040
  }
],
"hasOtherLoanFeature": true,
"hasPrepaymentPenalty": true,
"improvementCost": 100,
"initialBuydownRate": 401,
"interestOnlyMonthCount": 4,
"interestRate": 4,
"isBalloon": true,
"isBorrowerInCommunityPropState": true,
"isConstructionToPermanent": true,
"isContractForDeed": true,
"isEnergyRelatedImprovement": true,
"isInterestOnly": true,
"isNegativeAmortization": true,
"isPropInCommunityPropState": true,
"isRenovation": true,
"isSingleClosing": true,
"isSubjectToPriorityLien": true,
```

```
"isTempIntRateBuydown": true,
"leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
"liabilities": [
  {
    "accountNumber": "134234242",
    "accountType": "Revolving",
    "borrowersExternalIds": [
      "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "creditLimitAmount": 34353,
    "creditorName": "BOFA",
    "extendedFields": [],
    "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "isJointLiability": true,
    "liabilityClass": "Financial",
    "loanType": "Conventional",
    "monthlyPaymentAmount": 35353,
    "name": "Liab1",
    "otherLiabilityType": "Child Support",
    "shouldBePaidInFull": true,
    "unpaidBalanceAmount": 242
  },
  {
    "accountNumber": "464634123",
    "accountType": "Revolving",
    "borrowersExternalIds": [
      "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "creditLimitAmount": 423465356,
    "creditorName": "CHase",
    "extendedFields": [],
    "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
    "isJointLiability": true,
    "liabilityClass": "Financial",
    "loanType": "Conventional",
    "monthlyPaymentAmount": 2423535,
    "name": "Liab2",
    "otherLiabilityType": "Alimony",
    "shouldBePaidInFull": true,
    "unpaidBalanceAmount": 553
  }
],
"loanPurpose": "Purchase",
"lotAcquiredDate": "2019-10-31T19:00:00.000Z",
"lotOriginalCost": 200.3,
"monthsBeforeFirstAdj": 2,
"monthsBetweenAdjustments": 3,
"mortgageLienType": "First Lien",
"mortgageProgramType": "Conventional",
"name": "Loan1",
"nativeLandTenure": "Fee Simple (On a Reservation)",
"otherAmortizationType": "Test Amortization type",
```

```

"otherLoanFeature": "Test Loan Feature",
"otherLoanPurpose": "Test Loan Purpose",
"otherMortgageProgramType": "Test program",
"otherRefinanceProgType": "Test Refinance",
"prepayPenaltyTermMonth": 5,
"projectType": "Cooperative",
"properties": [
  {
    "esMonthlyRentalIncome": 400506,
    "esNetMonthlyRentalIncome": 304056,
    "extendedFields": [],
    "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
    "isManufacturedHome": true,
    "isMixedUseProperty": true,
    "loanPurposeType": "Purchase",
    "name": "Prop1",
    "propertyUseType": "Primary Residence",
    "propertyValue": 50500555,
    "requestedLoanAmount": 5005000,
    "unitsFinancedCount": 5
  }
],
"refinanceProgramType": "Full Documentation",
"refinanceType": "No Cash Out",
"status": "New",
"titleHolders": [
  {
    "extendedFields": [],
    "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
    "isCurrentTitleHolder": true,
    "name": "T1",
    "titleHolderName": "Times"
  }
],
"titleType": "Joint Tenancy with Right of Survivorship",
"trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	Account associated with the application.	Required if opportunityId isn't provided	48.0
amortizationTerm	Integer	Duration of the amortization in months.	Optional	48.0
amortizationType	String	Amortization type for loan.	Optional	48.0
assets	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
balloonTermMonths	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
borrowers	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
extendedFields	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
financials	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Optional	48.0
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isCommunityProp	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionRenew	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyRelated	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isInCommunityPropertyState	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0
leaseholdExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBetweenAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if accountId isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input ¹	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input ¹	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Response body

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Result []	Representation of mortgage result.	Small, 48.0	48.0

Sample Response body

```
{
  "result" : {
    "assets" : [ {
      "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "id" : "0cgRM0000000JABYA2"
    }, {
      "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
      "id" : "0cgRM0000000JACYA2"
    } ],
    "borrowers" : [ {
      "addresses" : [ {
        "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
        "id" : "0cjRM00000008VYAQ"
      } ],
      "declarations" : [ {
        "externalId" : "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
        "id" : "0cVRM000000008f2AA"
      } ],
      "employments" : [ {
        "externalId" : "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
        "id" : "0ckRM00000000OhYAI"
      } ],
      "externalId" : "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "id" : "0cURM00000000K32AI",
      "incomes" : [ {
        "externalId" : "b19d9372-df99-4eec-9de0-ad785503992d",
        "id" : "0ciRM000000008GYAQ"
      } ]
    }, {
      "addresses" : [ {
        "externalId" : "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "id" : "0cjRM000000008WYAQ"
      } ],
      "declarations" : [ {
        "externalId" : "704e7cfcd-932c-4a17-81ad-844fe1a007c6",
        "id" : "0cVRM000000008g2AA"
      } ],
      "employments" : [ {
        "externalId" : "34380cb7-95ca-4867-9a74-972af1be22db",
        "id" : "0ckRM000000000iYAI"
      } ],
      "externalId" : "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
      "id" : "0cURM00000000K32AI"
    } ]
  }
}
```

```
        "id" : "0cURM00000000K42AI",
        "incomes" : [ {
            "externalId" : "91027067-09d3-45f2-a0fc-217ce1f63458",
            "id" : "0ciRM000000008HYAQ"
        } ],
    },
    "externalId" : "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
    "financials" : [ {
        "externalId" : "af7e7c76-33ac-4005-b377-4b4663a49ec9",
        "id" : "0cCRM00000000812AA"
    }],
    "id" : "0cdRM00000000sUYAQ",
    "liabilities" : [ {
        "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
        "id" : "0chRM0000000HjJYAU"
    },
    {
        "externalId" : "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
        "id" : "0chRM0000000HjKYAU"
    }],
    "properties" : [ {
        "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
        "id" : "0cPRM000000007c2AA"
    }],
    "titleHolders" : [ {
        "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
        "id" : "0ctrM00000000Bf2AI"
    }]
}
}
```

Public Complaint

Create a customer complaint.

Streamline customer complaint management in Financial Services Cloud by orchestrating complaint workflows. Raise a customer complaint as part of the complaint workflow using this resource.

Resource

```
/connect/service-excellence/public-complaint
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/service-excellence/public-complaint
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```
{  
    "assessmentId": "0U3RO0000000Cp20AE",  
    "complaintInfo": {  
        "incidentDate": "2022-04-07",  
        "complaintType": "Information, sums/charges or product performance",  
        "complaintSubType": "Product disclosure information",  
        "status": "In Progress",  
        "subject": "Account Annual Maintenance Charges",  
        "priority": "High",  
        "description": "Annual maintenance charges not disclosed upfront",  
        "email": "Tody@email.com",  
        "productType": "Credit Card or Prepaid Card",  
        "additionalInfo": {  
            "data": {  
                "Comments": {  
                    "value": "This case needs to be handled on priority"  
                }  
            }  
        }  
    },  
    "caseInfo": {  
        "accountId": "001RO000004WKi1YAG",  
        "subject": "Reversal of Account Annual Maintenance Charges",  
        "status": "Pending",  
        "description": "Annual maintenance charges to be reversed",  
        "origin": "Email",  
        "reason": "Other",  
        "additionalInfo": {  
            "data": {  
                "Priority": {  
                    "value": "High"  
                }  
            }  
        }  
    },  
    "caseParticipantInfo": {  
        "data": [  
            {  
                "role": "Complainant Representative",  
                "status": "Pending",  
                "participantId": "001RO000004WKi1YAG",  
                "preferredCallTimeFrom": "10:30:30",  
                "preferredCallTimeTo": "12:30:30",  
                "preferredCommunicationMode": "Email",  
                "authorizationProof": "Email",  
                "additionalInfo": {  
                    "data": {  
                        "Name": {  
                            "value": "CP-0000000039"  
                        }  
                    }  
                }  
            }  
        ]  
    }  
}
```

```

        }
    },
    "documentInfo": {
        "data": [
            {
                "id": "069R0000004YynYAE",
                "name": "Aadhar"
            },
            {
                "id": "069R0000004p11YAA",
                "name": "Pan",
                "typeId": "0deR00000000J7YAI"
            }
        ]
    },
    "shouldInclInRegulatoryRpt": true
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
assessmentId	String	Pre-complaint assessment ID. Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.	Optional	58.0
caseInfo	Case Info Wrapper	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
caseParticipantInfo	Case Participant Info Wrapper[]	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
complaintInfo	Complaint Info Wrapper	Details of the complaint to be raised.	Required	58.0
documentInfo	Document Info Attributes Wrapper[]	Details of the documents supporting the complaint.	Optional	58.0
shouldInclInRegulatoryRpt	Boolean	Indicates whether to include the complaint in regulatory reports (true) or not (false). The default value is false.	Optional	58.0

Response body for POST[Complaint Management Output](#)

Record Alerts (Financial Accounts)

Retrieve a list of active record alerts on financial accounts.

The following is a list of alerts retrieved for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/financialservices/recordalerts/financialaccount/${financialAccountId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices/recordalerts/financialaccount/a0URO000000Ccbz2AC
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Response body for GET[Record Alert Collection](#)**JSON example of response body**

```
{  
  "recordAlerts" : [ {  
    "actions" : {  
      "actionInfoCollection" : [ {  
        "actionName" : "dismiss",  
        "parameters" : [ ]  
      }, {  
        "actionName" : "snooze",  
        "parameters" : [ "effectiveDate" ]  
      } ]  
    },  
    "description" : "Alert description from external source system",  
    "severity" : "Test",  
    "source" : "External",  
    "sourceSystemId" : "sourceSystemId",  
    "subject" : "Test external subject",  
    "whatId" : "a0URO000000Ccbz2AC"  
  }, {  
    "actions" : {  
      "actionInfoCollection" : [ {  
        "actionName" : "dismiss",  
        "parameters" : [ ]  
      } ]  
    }  
  } ]  
}
```

```
        },
        {
            "actionName" : "snooze",
            "parameters" : [ "effectiveDate" ]
        }
    ],
},
"active" : true,
"description" : "abc",
"effectiveDate" : "2021-11-11T20:40:06.000Z",
"id" : "0qZRO0000000000Q",
"parentId" : "a0URO0000000Ccbz",
"recordAlertCategoryName" : "Fraud",
"severity" : "Error",
"source" : "Internal",
"subject" : "Alert on FAT1",
"validUntilDate" : "2022-03-10T20:00:00.000Z",
"whatId" : "a0TRO000000DrWJ"
},
{
    "actions" : [
        {
            "actionInfoCollection" : [ {
                "actionName" : "dismiss",
                "parameters" : [ ]
            },
            {
                "actionName" : "snooze",
                "parameters" : [ "effectiveDate" ]
            }
        ],
        "active" : true,
        "description" : "Unauthorized transaction on card ending with -XXXX on Nov. 11, 2021 in Norfolk, VA",
        "effectiveDate" : "2021-11-03T19:00:00.000Z",
        "id" : "0qZRO000000003e",
        "recordAlertCategoryName" : "Fraud",
        "severity" : "Error",
        "source" : "Internal",
        "subject" : "Fraudulent Transaction",
        "validUntilDate" : "2022-11-10T20:00:00.000Z",
        "whatId" : "a0URO000000Ccbz"
    },
    {
        "actions" : [
            {
                "actionInfoCollection" : [ {
                    "actionName" : "dismiss",
                    "parameters" : [ ]
                },
                {
                    "actionName" : "snooze",
                    "parameters" : [ "effectiveDate" ]
                }
            ],
            "active" : true,
            "description" : "Transaction has an issue",
            "effectiveDate" : "2021-11-10T21:02:48.000Z",
            "id" : "0qZRO000000000u",
            "parentId" : "a0URO0000000Ccbz",
            "recordAlertCategoryName" : "Fraud",
            "severity" : "Error",
        ]
    }
]
```

```

        "source" : "Internal",
        "subject" : "Transaction has an issue",
        "validUntilDate" : "2021-12-17T20:00:00.000Z",
        "whatId" : "a0TRO000000DrWO"
    } ]
}

```

Record Alerts (Person Accounts)

Retrieve a list of active record alerts on person accounts.

The following is a list of alerts retrieved for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/financialservices/recordalerts/person/${personId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices
/recordalerts/person/001R0000002Kn4BYAS
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

[Record Alert Collection](#)

JSON example of response body

```
{
    "recordAlerts" : [ {
        "actions" : {
            "actionInfoCollection" : [ {
                "actionName" : "dismiss",
                "parameters" : [ ]
            }, {
                "actionName" : "snooze",
                "parameters" : [ "effectiveDate" ]
            } ]
        },
        "description" : "Alert description from an external source system",
        "severity" : "Test",
        "source" : "External",
        "sourceSystemId" : "sourceSystemId",
        "subject" : "foo apex subject",
        "whatId" : "001R0000002Kn4BYAS"
    }
}
```

```

}, {
  "actions" : {
    "actionInfoCollection" : [ {
      "actionName" : "dismiss",
      "parameters" : [ ]
    }, {
      "actionName" : "snooze",
      "parameters" : [ "effectiveDate" ]
    } ]
  },
  "active" : true,
  "description" : "Unauthorized transaction on card",
  "effectiveDate" : "2021-11-10T20:00:00.000Z",
  "id" : "0qZRO0000000003Z",
  "recordAlertCategoryName" : "Fraud",
  "severity" : "Error",
  "source" : "Internal",
  "subject" : "Fraud Transaction 3",
  "validUntilDate" : "2022-11-10T20:00:00.000Z",
  "whatId" : "001RO000002Kn4B"
}, {
  "actions" : {
    "actionInfoCollection" : [ {
      "actionName" : "dismiss",
      "parameters" : [ ]
    }, {
      "actionName" : "snooze",
      "parameters" : [ "effectiveDate" ]
    } ]
  },
  "active" : true,
  "description" : "Your card was used in a fraudulent transaction on 11/4/2021",
  "effectiveDate" : "2021-11-10T20:00:00.000Z",
  "id" : "0qZRO0000000003K",
  "recordAlertCategoryName" : "Fraud",
  "severity" : "Error",
  "source" : "Internal",
  "subject" : "Fraud Transaction Alert",
  "validUntilDate" : "2022-11-04T19:00:00.000Z",
  "whatId" : "001RO000002Kn4B"
} ]
}
}

```

Retrieval Summary

Get the data of a retrieval summary definition by using the root record ID and the retrieval summary definition ID.

Resource

```
/connect/retrieval-summary/runtime/retrievalSummaryDefinitionApiName/rootRecordId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/retrieval-summary/runtime/HouseholdAPITrunkHealthManagement/001s000003gk2IA
```

Available version

61.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
fetchRealTime	Boolean	Indicates whether the household financial data has to be fetched in real time for financial accounts, financial holdings, assets and liabilities, and members of a household.	Optional	63.0

Response body for GET[Retrieval Summary Result on page 1178](#)

Request Bodies

Here's a list of Financial Services Cloud Business API request bodies.

[Address Input](#)

Represents address details.

[Asset Input](#)

Represents details about the borrower's and co-borrower's current personal and real property.

[Borrower Address Input](#)

Input representation for Borrower addresses.

[Borrower Declaration Input](#)

Input representation for Borrower declarations

[Borrower Employment Input](#)

Represents details about the borrower's or co-borrower's current and past employment.

[Borrower Income Input](#)

Input representation for Borrower income

[Borrower Input](#)

Represents details of the borrower or co-borrower for the loan application.

[Case Info Wrapper](#)

Input representation of a case related to the complaint.

[Case Participant Info Wrapper](#)

Input representation of a case participant associated with the complaint.

[Complaint Info Wrapper](#)

Input representation of the complaint details.

[Complaint Management Request Input](#)

Input representation of the request to create a public complaint.

[Document Info Attributes Wrapper](#)

Input representation of the details of a supporting document for the complaint.

[Ethoca Alert Callback Input](#)

Ethoca alert input payload for transaction dispute management.

[Ethoca Event](#)

Ethoca event payload.

[Ethoca Links](#)

Ethoca resource link payload.

[Extended Fields Input](#)

Input representation for extended fields.

[Filter Criteria](#)

Filter criteria for queries of financial goals and households.

[Financial Goal Create Input](#)

Input for creating a single financial goal with goal members and funding.

[Financial Goal Funding Input](#)

Input for Financial Accounts that fund the Financial Goal.

[Financial Goal Input](#)

Input for creating or updating a financial goal.

[Financial Goal List Create Input](#)

Input for creating multiple financial goals with goal members.

[Financial Goal Party Input](#)

Input for adding or removing financial goal members.

[Financial Goal Patch Input](#)

Input for updating a financial goal.

[Financial Goal Query Input](#)

Query input for financial goals and goal members based on a parent record ID. The parent can be a Person Account or Household.

[Financial Input](#)

Input details for the financial transaction.

[Generic Object Wrapper](#)

Input representation of additional details of the case, case participant, or complaint.

[Liability Input](#)

Details about the borrower and co-borrower current liabilities.

[Mapper Input Representation](#)

Represents the input representation for the Mapper POST method.

[Mortgage Input](#)

Represents the input for mortgage POST or PATCH method.

[Property Input](#)

Represents details of the property the loan application finances.

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Address Input

Represents address details.

Root XML tag

<address>

JSON example

```
{
  "city": "San Francisco",
  "country": "United States",
  "postalCode": "94105",
  "state": "CA",
  "street": "50 Fremont Street"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
city	String	The address city.	Optional	48.0
country	String	The address country.	Optional	48.0
postalCode	String	The address postal code.	Optional	48.0
state	String	The address state.	Optional	48.0
street	String	The address street.	Optional	48.0

Asset Input

Represents details about the borrower's and co-borrower's current personal and real property.

Root XML tag

<assets>

JSON example

```
{
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dateAcquired": "2018-01-01T00:00:00Z",
      "debtType": "Mortgage"
    }
  ]
}
```

```

    "dispositionType": "Pending Sale",
    "extendedFields": [],
    "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "financialInstitutionName": "BOFA",
    "grossMonthlyRentalIncome": 355395355,
    "name": "Asset1",
    "netMonthlyRentalIncome": 2535345,
    "presentMarketValue": 7937399,
    "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
    },
    "realEstateMonthlyExpense": 3413131
},
{
    "accountNumber": "2424242424",
    "accountType": "Checking",
    "assetClass": "Real Estate",
    "assetType": "Earnest Money",
    "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "cashOrMarketValue": 24424525,
    "dispositionType": "Sold",
    "extendedFields": [],
    "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
    "financialInstitutionName": "wells",
    "grossMonthlyRentalIncome": 24242224,
    "name": "Asset2",
    "netMonthlyRentalIncome": 242424234,
    "presentMarketValue": 2423131313,
    "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
    },
    "realEstateMonthlyExpense": 2242423424
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountNumber	String	Account number associated with financial institution holding asset.	Optional	48.0
accountType	String	Identifies asset account type.	Optional	48.0
assetClass	String	Identifies which asset class total to include the asset's value in.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
assetType	String	Identifies type of other asset.	Optional	48.0
borrowersExternalIds	String[]	External IDs of borrower and co-borrowers.	Optional	48.0
borrowersIds	String[]	IDs of borrower and co-borrowers.	Optional	48.0
cashOrMarketValue	Double	Asset's cash or current market value.	Optional	48.0
dispositionType	String	Real estate asset's planned future use.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0
financialInstitutionName	String	Name of financial institution where financial account is held.	Optional	48.0
grossMonthlyRentalIncome	Double	Borrower's monthly rent income collected on real estate asset.	Optional	48.0
id	String	ID of the asset.	Optional	48.0
isJointAsset	Boolean	Indicates whether asset is held jointly.	Optional	48.0
name	String	Name of the loan application asset.	Optional	48.0
netMonthlyRentalIncome	Double	Borrower's net monthly income on real estate asset.	Optional	48.0
presentMarketValue	Double	Cash value of real estate asset if sold today.	Optional	48.0
realEstateAddress	Address Input[]	Real estate asset's address.	Optional	48.0
realEstateMonthlyExpense	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Optional	48.0

Borrower Address Input

Input representation for Borrower addresses.

Root XML tag

<addresses>

JSON example

```
{
  "addresses": [
    {
      "addressOwnership": "Own",
      "extendedFields": []
    }
  ]
}
```

```

"externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
"monthlyRentPayment": 2300,
"name": "Addr1",
"residenceAdditionalMonthCount": 23,
"residenceAddress": {
  "city": "San Francisco",
  "country": "United States",
  "postalCode": "94105",
  "state": "CA",
  "street": "50 Fremont Street"
},
"residenceYearCount": 3,
"residencyType": "Former Residence"
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addressOwnership	String	Identifies borrower's status at residence.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's address.	Optional	48.0
externalId	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Optional	48.0
id	String	ID of the borrower's address	Optional	48.0
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Optional	48.0
name	String	Name of the borrower's address.	Optional	48.0
residenceMonth	Integer	Additional months borrower lived at this residence.	Optional	48.0
residenceAddress	Address Input[]	Residence's physical address.	Optional	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Optional	48.0
residencyType	String	Identifies borrower's current residency status.	Optional	48.0

Borrower Declaration Input

Input representation for Borrower declarations

Root XML tag

```
<declarations>
```

JSON example

```
{
  "declarations": [
    {
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
bankruptcyType	String	Bankruptcy type or types (if applicable).	Optional	48.0
borrowedAmount	Double	Amount of money borrowed for loan application transaction.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the declaration.	Optional	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
hasBorrowedMoney	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Optional	48.0
hasCoSignerUndisclosedDebt	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Optional	48.0
hasDeclaredBankruptcy	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
hasDeedSurrender	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Optional	48.0
hasOutstandingJudgment	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Optional	48.0
hasOwnershipInterest	Boolean	Indicates whether borrower had ownership interest in a property in the last three years.	Optional	48.0
hasPastShortSale	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past seven years.	Optional	48.0
hasPropertyForeclosed	Boolean	Indicates whether borrower had property foreclosed upon in last seven years.	Optional	48.0
hasUndisclosedCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Optional	48.0
hasUndisclosedLoan	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Optional	48.0
<code>id</code>	String	ID of the borrower declaration.	Optional	48.0
isPartyToLawsuit	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Optional	48.0
isPresentlyDelinquent	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Optional	48.0
isPrimaryResidence	Boolean	Indicates whether property to be borrower's primary residence.	Optional	48.0
isRelatedToSeller	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the declaration.	Optional	48.0
priorPropertyTitleType	String	Identifies how borrower held title in the ownership interest property.	Optional	48.0
priorPropertyUsageType	String	Identifies type of property borrower held ownership interest in.	Optional	48.0

Borrower Employment Input

Represents details about the borrower's or co-borrower's current and past employment.

Root XML tag

<employments>

JSON example

```
{
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>additionalMonth</code>	Integer	Additional number of months employed at this job (less than 12).	Optional	48.0
<code>currentJobYearCount</code>	Integer	Number of full years employed at this job.	Optional	48.0
<code>employerAddress</code>	Address Input[]	Address of borrower's employer or business.	Optional	48.0
<code>employerName</code>	String	Name of borrower's employer or business.	Optional	48.0
<code>employerPhone</code>	String	Employer's phone number.	Optional	48.0
<code>endDate</code>	String	Borrower's last date of employment at this job.	Optional	48.0
<code>extendedFields</code>	Extended Fields Input[]	Custom fields related to the borrower's employment.	Optional	48.0
<code>externalId</code>	String	Identifier assigned to imported employer data by external data source. (if applicable)	Optional	48.0
<code>id</code>	String	ID of the borrower's employment.	Optional	48.0
<code>isLessThanQuarterShare</code>	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Optional	48.0
<code>isSelfTransactionParty</code>	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Optional	48.0
<code>isSelfEmployed</code>	Boolean	Indicates whether borrower is self-employed or owns the business.	Optional	48.0
<code>jobTitle</code>	String	Borrower's job title or employer's business or industry type.	Optional	48.0
<code>monthlyBaseIncomeAmount</code>	Double	Borrower's monthly bonus from this job.	Optional	48.0
<code>monthlyBonusAmount</code>	Double	Borrower's monthly bonus from this job.	Optional	48.0
<code>monthlyCommissionAmount</code>	Double	Borrower's monthly commission from this job.	Optional	48.0
<code>monthlyIncome</code>	Double	Borrower's monthly income or loss from this business.	Optional	48.0
<code>monthlyEntitlement</code>	Double	Borrower's monthly military entitlement from this job.	Optional	48.0
<code>monthlyOtherIncome</code>	Double	Borrower's other monthly income from this job.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
monthlyOvertimeAmount	Double	Borrower's monthly overtime income from this job.	Optional	48.0
name	String	Name of the loan applicant employment.	Optional	48.0
startDate	String	Date borrower started working at this job.	Optional	48.0

Borrower Income Input

Input representation for Borrower income

Root XML tag

<incomes>

JSON example

```
{
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
      "incomeSourceType": "Capital Gains",
      "monthlyIncomeAmount": 100,
      "name": "Income1"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extendedFields	Extended Fields Input []	Custom fields related to the borrower's income.	Optional	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Optional	48.0
id	String	ID of the borrower's income.	Optional	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Optional	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Optional	48.0
name	String	Name of the other monthly income.	Optional	48.0

Borrower Input

Represents details of the borrower or co-borrower for the loan application.

Root XML tag

```
<borrowers>
```

JSON example

```
{
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
          "residenceAdditionalMonthCount": 23,
          "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94105",
            "state": "CA",
            "street": "50 Fremont Street"
          },
          "residenceYearCount": 3,
          "residencyType": "Former Residence"
        }
      ],
      "asianRaceSubType": "Asian Indian",
      "borrowerType": "Borrower",
      "citizenshipStatus": "U.S. Citizen",
      "declarations": [
        {
          "bankruptcyType": "Chapter 11",
          "borrowedAmount": 20000,
          "extendedFields": [],
          "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
          "hasBorrowedMoney": true,
          "hasCoSignerUndisclosedDebt": true,
          "hasDeclaredBankruptcy": true,
          "hasDeedSurrender": true,
          "hasOutstandingJudgement": true,
          "hasOwnershipInterest": true,
          "hasPastShortSale": true,
          "hasPropertyForeclosed": true,
          "hasUndisclosedAddCreditApp": true,
          "hasUndisclosedOtherPropLoan": true,
          "isPartyToLawsuit": true,
          "isPresentlyDelinquent": true,
          "isPrimaryResidence": true,
          "isRelatedToSeller": true,
          "name": "Decl1",
          "priorPropertyTitleType": "Yourself",
          "priorPropertyUsageType": "Secondary Residence"
        }
      ],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39"
    }
  ],
  "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39"
}
```

```
"dependentCount": 2,  
"dependentsAge": "25, 34",  
"employments": [  
    {  
        "currentJobAdditionalMonthCount": 24,  
        "currentJobYearCount": 4,  
        "employerAddress": {  
            "city": "Fresno",  
            "country": "United States",  
            "postalCode": "93721",  
            "state": "CA",  
            "street": "1500 Divisadero Street"  
        },  
        "extendedFields": [],  
        "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",  
        "isRelToTransactionParty": true,  
        "isLessThanQuarterShare": true,  
        "isSelfEmployed": true,  
        "jobTitle": "developer",  
        "monthlyBaseIncomeAmount": 2300,  
        "monthlyBonusAmount": 100,  
        "monthlyCommissionAmount": 10,  
        "monthlyIncome": 5000,  
        "monthlyMilitaryEntitlementAmt": 20,  
        "monthlyOtherIncomeAmount": 10,  
        "monthlyOvertimeAmount": 200,  
        "name": "Empl1",  
        "startDate": "2019-10-10T03:11:27.000Z"  
    },  
    ],  
    "ethnicitySubType": "Mexican",  
    "ethnicityType": "Not Hispanic or Latino",  
    "extendedFields": [],  
    "externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",  
    "genderType": "Female",  
    "hasMilitaryService": true,  
    "incomes": [  
        {  
            "extendedFields": [],  
            "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",  
            "incomeSourceType": "Capital Gains",  
            "monthlyIncomeAmount": 100,  
            "name": "Income1"  
        },  
        ],  
        "isActiveMilitary": true,  
        "isJointCredit": true,  
        "isSurvivingMilitarySpouse": true,  
        "maritalStatus": "Married",  
        "militaryTourExpirationMonth": 2,  
        "militaryTourExpirationYear": 2027,  
        "name": "BR1",  
        "otherAsianRaceSubType": "Indian",  
        "otherEthnicitySubType": "Mexico",  
    ]  
]
```

```
"otherPacIslandSubType": "Test Pacific Islander",
"pacificIslanderSubType": "Native Hawaiian",
"preferredLanguage": "English",
"raceType": "Asian",
"tribeName": "Pacific Islander",
"wasActiveMilitary": true,
"wasNonActivatedService": true
},
{
  "addresses": [
    {
      "addressOwnership": "Rent",
      "extendedFields": [],
      "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
      "monthlyRentPayment": 5000,
      "name": "Addr2",
      "residenceAdditionalMonthCount": 24,
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94115",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Present Address"
    }
  ],
  "asianRaceSubType": "Asian Indian",
  "borrowerType": "CoBorrower",
  "citizenshipStatus": "U.S. Citizen",
  "declarations": [
    {
      "bankruptcyType": "Chapter 12",
      "borrowedAmount": 657575,
      "extendedFields": [],
      "externalId": "704e7cf9-932c-4a17-81ad-844fe1a007c6",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Primary Residence"
    }
  ]
}
```

```
        }
    ],
    "dependentCount": 2,
    "dependentsAge": "34, 35",
    "employments": [
        {
            "currentJobAdditionalMonthCount": 24,
            "currentJobYearCount": 3,
            "employerAddress": {
                "city": "Fresno",
                "country": "United States",
                "postalCode": "93721",
                "state": "CA",
                "street": "2300 Stockton Street"
            },
            "extendedFields": [],
            "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
            "isRelToTransactionParty": true,
            "isLessThanQuarterShare": true,
            "isSelfEmployed": true,
            "jobTitle": "developer",
            "monthlyBaseIncomeAmount": 2400,
            "monthlyBonusAmount": 234,
            "monthlyCommissionAmount": 10,
            "monthlyIncome": 45668,
            "monthlyMilitaryEntitlementAmt": 20,
            "monthlyOtherIncomeAmount": 394,
            "monthlyOvertimeAmount": 123,
            "name": "Empl12",
            "startDate": "2019-10-10T03:11:27.000Z"
        }
    ],
    "ethnicitySubType": "Mexican",
    "ethnicityType": "Hispanic or Latino",
    "extendedFields": [],
    "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
    "genderType": "Female",
    "hasMilitaryService": true,
    "incomes": [
        {
            "extendedFields": [],
            "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
            "incomeSourceType": "Child Support",
            "monthlyIncomeAmount": 200,
            "name": "Income1"
        }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 3,
    "militaryTourExpirationYear": 2029,
    "name": "COB1",
```

```

    "otherAsianRaceSubType": "South india",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test pacific Islander",
    "pacificIslanderSubType": "Guamanian or Chamorro",
    "preferredLanguage": "English",
    "raceType": "American Indian or Alaska Native",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Borrower Address Input[]	Borrower's addresses.	Optional	48.0
asianRaceSubType	String	Borrower's Asian race.	Optional	48.0
borrowerType	String	Applicant's borrower type.	Optional	48.0
citizenshipStatus	String	Borrower's citizenship status.	Optional	48.0
contactId	String	Contact associated with this borrower.	Optional	48.0
declarations	Borrower Declaration Input[]	Borrower's declarations.	Optional	48.0
dependentCount	Integer	Borrower's number of dependents.	Optional	48.0
dependentsAge	String	Ages of borrower's dependents in a comma-separated list.	Optional	48.0
employments	Borrower EmploymentInput[]	Borrower's employments.	Optional	48.0
ethnicitySubType	String	Borrower's ethnicity.	Optional	48.0
ethnicityType	String	Borrower's ethnicity origin.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields.	Optional	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Optional	48.0
genderType	String	Borrower's gender.	Optional	48.0
hasMilitaryService	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the borrower.	Optional	48.0
incomes	Borrower Income Input[]	Borrower's incomes.	Optional	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Optional	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Optional	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Optional	48.0
maritalStatus	String	Borrower's marital status.	Optional	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Optional	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Optional	48.0
name	String	Name of the borrower.	Optional	48.0
otherAsianRaceType	String	Borrower's Asian race if other is specified.	Optional	48.0
otherEthnicityType	String	Borrower's ethnicity if other is specified.	Optional	48.0
otherPacificIslanderRaceType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Optional	48.0
pacificIslanderRaceType	String	Borrower's native Hawaiian or Pacific Islander race.	Optional	48.0
preferredLanguage	String	Borrower's preferred communication language.	Optional	48.0
raceType	String	Borrower's race.	Optional	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Optional	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Optional	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Optional	48.0

Case Info Wrapper

Input representation of a case related to the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account associated with the complainant.	Optional	58.0
additionalInfo	Map<String, Generic Object Wrapper>	Additional information about the case.	Optional	58.0
description	String	Description of the case.	Optional	58.0
origin	String	Origin of the case. Possible values are: <ul style="list-style-type: none"> Email Phone Web 	Optional	58.0
reason	String	Reason for creating the case. Possible values are: <ul style="list-style-type: none"> Breakdown Equipment Complexity Equipment Design Feedback Installation Other Performance 	Optional	58.0
status	String	Status of the case. Possible values are: <ul style="list-style-type: none"> Escalated In Progress New On Hold Response Received Submitted Waiting for Customer Working 	Optional	58.0
subject	String	Subject of the case.	Optional	58.0

Case Participant Info Wrapper

Input representation of a case participant associated with the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, Generic Object Wrapper >	Additional information about the case participant.	Optional	58.0
authorizationProof	String	Proof of authorization for the case participant. Possible values are: <ul style="list-style-type: none"> • Email Consent • Verbal Consent • Power of Attorney • Joint Ownership 	Required when the complainant is a customer representative, otherwise optional	58.0
participantId	String	Case participant's account ID.	Required	58.0
preferredCallTimeFrom	String	Preferred time window to call the case participant.	Optional	58.0
preferredCallTimeTo	String	Preferred time window to call the case participant.	Optional	58.0
preferredCommunication	String	Preferred mode of communication by the case participant to get updates related to the complaint.	Optional	58.0
role	String	Role of the case participant. Possible values are: <ul style="list-style-type: none"> • Complainant • Complainant Representative 	Optional	58.0
status	String	Status of the case related to the participant. Possible values are: <ul style="list-style-type: none"> • Active • In Review • Pending • Submitted 	Optional	58.0

Complaint Info Wrapper

Input representation of the complaint details.

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account associated with the complainant.	Optional	58.0
additionalInfo	Map<String, Generic Object Wrapper >	Additional details of the complaint.	Optional	58.0
complaintSubType	String	Subtype of the complaint. Possible values are: <ul style="list-style-type: none"> • Account Opening/Closure • Attempts to Collect Debt not Owed • Auto Debit Mandate • Cash not Dispensed • Communication Tactics • Credit Limit Changed • Credit Report / Credit Score • Delays / Timescales • Disputes over sum/charges • Errors / not following instructions • Fraud Handling • Inaccessible ATMs • Inaccessible Branch Entrances • Inaccessible Website • Inaccessible Mobile banking features • Misleading Advertising • Mobile Banking - Features or Functionality • No Written Notification About Debt • Online Banking Features or Functionality • Other General Admin/Customer Service 	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Others • Problem when Making Payments • Product Disclosure Information • Product Performance/Features • Unauthorized Transaction(s) Unclear Arrangement • Unclear Guidance • Unsuitable Advice 		
complaintType	String	Type of the complaint. Possible values are:	Required	58.0
		<ul style="list-style-type: none"> • Accessibility Issues • Advising, Selling and Arranging • Digital or Technology • Financial Hardships or Collections • General Admin/ Customer Service • Information, sums/charges or product performance • Lending / Credit • Marketing or Corporate Communications • Others • Transaction Related 		
description	String	Description of the complaint.	Optional	58.0
email	String	Email ID of the complainant.	Optional	58.0
incidentDate	String	Date the complaint-related incident occurred.	Required	58.0
priority	String	Priority of the complaint. Possible values are:	Optional	58.0
		<ul style="list-style-type: none"> • Critical • High • Low 		

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Medium <p>The default value is Medium.</p>		
productType	String	<p>Product type related to the complaint. Possible values are:</p> <ul style="list-style-type: none"> ATM / debit card Credit Card or Prepaid Card Insurance Investments Merchant Services Mobile / electronic banking Money transfers, virtual currency, and money services Mortgage / Home Finance Other Personal Loan / other loans Vehicle loan or lease 	Optional	58.0
receivedDate	String	Date of reporting for the complaint.	Required	58.0
status	String	<p>Resolution status of the complaint. Possible values are:</p> <ul style="list-style-type: none"> In Review Pending Resolved Submitted <p>The default value is Submitted.</p>	Optional	58.0
subject	String	Subject of the complaint.	Optional	58.0

Complaint Management Request Input

Input representation of the request to create a public complaint.

JSON example

```
{
  "assessmentId": "0U3R00000000Cp20AE",
  "complaintInfo": {
    "incidentDate": "2022-04-07",
    "productType": "Mobile / electronic banking"
  }
}
```

```

"complaintType": "Information, sums/charges or product performance",
"complaintSubType": "Product disclosure information",
"status": "In Progress",
"subject": "Account Annual Maintenance Charges",
"priority": "High",
"description": "Annual maintenance charges not disclosed upfront",
"email": "Tody@email.com",
"productType": "Credit Card or Prepaid Card",
"additionalInfo": {
    "data": {
        "Comments": {
            "value": "This case needs to be handled on priority"
        }
    }
},
"caseInfo": {
    "accountId": "001R0000004WKi1YAG",
    "subject": "Reversal of Account Annual Maintenance Charges",
    "status": "Pending",
    "description": "Annual maintenance charges to be reversed",
    "origin": "Email",
    "reason": "Other",
    "additionalInfo": {
        "data": {
            "Priority": {
                "value": "High"
            }
        }
    }
},
"caseParticipantInfo": {
    "data": [
        {
            "role": "Complainant Representative",
            "status": "Pending",
            "participantId": "001R0000004WKi1YAG",
            "preferredCallTimeFrom": "10:30:30",
            "preferredCallTimeTo": "12:30:30",
            "preferredCommunicationMode": "Email",
            "authorizationProof": "Email",
            "additionalInfo": {
                "data": {
                    "Name": {
                        "value": "CP-0000000039"
                    }
                }
            }
        }
    ],
    "documentInfo": {
        "data": [
            {
                "id": "069R00000004YynYAE",
                "name": "Aadhar"
            }
        ]
    }
}

```

```

        },
        {
            "id": "069R00000004p11YAA",
            "name": "Pan",
            "typeId": "0deR00000000J7YAI"
        }
    ],
    "shouldInclInRegulatoryRpt": true
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
assessmentId	String	Pre-complaint assessment ID. Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.	Optional	58.0
caseInfo	Case Info Wrapper	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
caseParticipantInfo	Case Participant Info Wrapper	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
complaintInfo	Complaint Info Wrapper	Details of the complaint to be raised.	Required	58.0
documentInfo	Document Info Attributes Wrapper	Details of the documents supporting the complaint.	Optional	58.0
shouldInclInRegulatoryRpt	Boolean	Indicates whether to include the complaint in regulatory reports (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	58.0

Document Info Attributes Wrapper

Input representation of the details of a supporting document for the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the supporting content document.	Required	58.0
name	String	Name of the supporting content document.	Required	58.0
typeId	String	ID of the supporting content document type.	Optional	58.0

Ethoca Alert Callback Input

Ethoca alert input payload for transaction dispute management.

JSON example

```
{
  "ethocaInputPayload": {
    "events": [
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"
        }
      },
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876365",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876365"
        }
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
ethocaInputPayload	Ethoca Event on page 1114	Ethoca event input payload.	Required	60.0

Ethoca Event

Ethoca event payload.

JSON example

```
{
  "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
  "eventType": "Batch Processed",
  "resourceLink": {
    "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
eventType	String	Type of event.	Required	60.0
id	String	ID of the event.	Required	60.0
resourceLink	Ethoca Links	Resource link for the event.	Required	60.0

Ethoca Links

Ethoca resource link payload.

JSON example

```
{
  "resource": "https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
resource	String	Resource link.	Required	60.0

Extended Fields Input

Input representation for extended fields.

Root XML tag

<extendedFields>

JSON example

```
{
  "extendedFields": [
    ...
  ]
}
```

```
{
  "name": "assigned_to",
  "value": "abcd"
},
{
  "name": "ownership",
  "value": true
}
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the custom field.	Optional	48.0
value	String	Value of the custom field.	Optional	48.0

Filter Criteria

Filter criteria for queries of financial goals and households.

JSON example

```
{
  "fieldName": "AccountContactRelation.Roles",
  "operator": "in",
  "value": "BusinessUser,DecisionMaker"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldName	String	API Name of the field used in the filter.	Required	59.0
operator	String	Operator used in the filter. Valid values are:	Required	59.0
		<ul style="list-style-type: none"> • equals • not equals • in 		
value	String	Value of the field used in the filter.	Required	59.0

Financial Goal Create Input

Input for creating a single financial goal with goal members and funding.

JSON example

In this example, `carType`, `role`, and `FSC9__FinancialAccount__c` are custom fields.

```
{
  "financialGoal": {
    "actualAmount": "$1000.00",
    "completionDate": "2024-05-01",
    "initialAmount": "$500.00",
    "description": "Car for commuting",
    "priority": "P1",
    "startDate": "2023-05-01",
    "status": "InProgress",
    "targetAmount": "$50000.00",
    "targetDate": "2024-05-01",
    "name": "Goal1",
    "type": "Auto",
    "customFields": {
      "carType": "New luxury car"
    }
  },
  "financialGoalParties": [
    {
      "accountId": "001xx000003GYyJAAW",
      "customFields": {
        "role": "Auto purchaser"
      }
    },
    {
      "accountId": "001xx000005dJCxYAM",
      "customFields": {
        "role": "Auto purchaser partner"
      }
    }
  ],
  "financialGoalFundings": [
    {
      "amount": 1000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AU"
      }
    },
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
financialGoal	Financial Goal Input	Financial Goal data.	At least one required	59.0
financialGoalFundings	Financial Goal Funding Input []	Financial Accounts that fund the Financial Goal.	Optional	60.0
financialGoalParties	Financial Goal Party Input []	Goal members to be included in the Financial Goal.	At least one per goal required	59.0

Financial Goal Funding Input

Input for Financial Accounts that fund the Financial Goal.

JSON example

```
{
  "financialGoalFundings": [
    {
      "amount": 1000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AU"
      }
    },
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Amount funded by the funding source.	Required	60.0
currencyIsoCode	String	Currency ISO code for the currency fields.	Optional	60.0
customFields	Map<String, Object>	Financial Goal funding custom fields.	Optional	60.0

Financial Goal Input

Input for creating or updating a financial goal.

JSON example

In this example, `carType` is a custom field.

```
{
  "actualAmount": "$1000.00",
  "completionDate": "2024-05-01",
  "initialAmount": "$500.00",
  "description": "Car for commuting",
  "priority": "P1",
  "startDate": "2023-05-01",
  "status": "InProgress",
  "targetAmount": "$50000.00",
  "targetDate": "2024-05-01",
  "name": "Goal1",
  "type": "Auto",
  "customFields": {
    "carType": "New luxury car"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
actualAmount	String	The amount currently in the account associated with this goal.	Required for create, optional for update	59.0
category	String	The category of the goal.	Optional	60.0
completionDate	String	The date at which this goal reaches the <code>targetAmount</code> .	Required for create, optional for update	59.0
currencyIsoCode	String	Currency ISO code for the currency fields.	Optional	60.0
customFields	Map<String, Object>	Any custom fields added for a particular banking institution.	Optional	59.0
description	String	A description of this goal.	Required for create, optional for update	59.0
estimatedSuccessPercent	String	The success percentage estimated for the financial goal.	Optional	60.0
financialPlanId	String	The ID of the associated financial plan.	Optional	60.0
frequency	String	The frequency at which the money is withdrawn. Values are:	Optional	60.0
		<ul style="list-style-type: none"> Monthly Weekly Annually 		

Name	Type	Description	Required or Optional	Available Version
initialAmount	String	The starting amount in the account associated with this goal.	Required for create, not editable for update	59.0
name	String	A name for the goal.	Required for create, optional for update	59.0
priority	String	The priority of this goal.	Required for create, optional for update	59.0
startDate	String	The creation date of this goal.	Required for create, not editable for update	59.0
status	String	The status of this goal's progress.	Required for create, optional for update	59.0
targetAmount	String	The amount this goal is intended to raise.	Required for create, optional for update	59.0
targetDate	String	The date at which this goal is intended to reach the <code>targetAmount</code> .	Required for create, optional for update	59.0
type	String	The goal type, for example <code>Auto</code> or <code>Retirement</code> .	Required for create, optional for update	59.0

Financial Goal List Create Input

Input for creating multiple financial goals with goal members.

JSON example

In this example, `carType` and `role` are custom fields.

```
{
  "financialGoals": [
    {
      "financialGoal": {
        "actualAmount": "$1000.00",
        "completionDate": "2024-05-01",
        "initialAmount": "$500.00",
        "description": "Car for commuting",
        "priority": "P1",
        "startDate": "2023-05-01",
        "status": "InProgress",
        "targetAmount": "$50000.00",
        "targetDate": "2024-05-01",
        "name": "Goal1",
        "type": "Auto",
        "customFields": {
          "carType": "New luxury car"
        }
      }
    }
  ]
}
```

```
        },
        "financialGoalParties": [
            {
                "accountId": "001xx000003GYyJAaW",
                "customFields": {
                    "role": "Auto purchaser"
                }
            },
            {
                "accountId": "001xx000005dJCxYAM",
                "customFields": {
                    "role": "Auto purchaser partner"
                }
            }
        ]
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
financialGoals	Financial Goal Create Input	List of goals and goal members to be created.	Required	59.0

Financial Goal Party Input

Input for adding or removing financial goal members.

JSON example

In this example, `role` is a custom field.

```
{  
  "accountId": "001xx000003GYyJAAW",  
  "customFields": {  
    "role": "Auto purchaser"  
  }  
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of a Person Account that represents a goal member.	At least one required	59.0
customFields	Map<String, Object>	Custom fields added for a particular banking institution.	Optional	59.0

Financial Goal Patch Input

Input for updating a financial goal.

JSON example

In this example, `carType`, `role`, and `FSC9__FinancialAccount__c` are custom fields.

```
{
  "financialGoal": {
    "completionDate": "2024-06-01",
    "description": "Cars for commuting",
    "targetAmount": "$55000.00",
    "targetDate": "2024-06-01",
    "customFields": {
      "carType": "New luxury car and used car"
    }
  },
  "addFinancialGoalParties": [
    {
      "accountId": "001xx000003GYyJAyV",
      "customFields": {
        "role": "Auto purchaser daughter"
      }
    }
  ],
  "addFinancialGoalFundings": [
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addFinancialGoalFundings	Financial Goal Funding Input[]	Financial Accounts to be added to the Financial Goal.	Optional	60.0
addFinancialGoalParties	Financial Goal Party Input[]	Goal members to be added to the Financial Goal.	Optional	59.0
financialGoal	Financial Goal Input	Financial Goal data.	Required for 59.0, Optional for 60.0	59.0
removeFinancialGoalFundings	Financial Goal Funding Input[]	Financial Accounts to be removed from the Financial Goal.	Optional	60.0
removeFinancialGoalParties	Financial Goal Party Input[]	Goal members to be removed from the Financial Goal.	Optional	59.0

Financial Goal Query Input

Query input for financial goals and goal members based on a parent record ID. The parent can be a Person Account or Household.

JSON example

```
{
  "financialGoalFields": [
    "Name",
    "Description",
    "ActualAmount",
    "CompletionDate"
  ],
  "financialGoalPartyFields": [
    "AccountId",
    "Account.Name"
  ],
  "filterCriteria": [
    {
      "fieldName": "FinancialGoal.Type",
      "operator": "equals",
      "value": "Retirement"
    }
  ],
  "offset": 1,
  "limit": 10,
  "sortBy": "DESC",
  "orderBy": "FinancialGoal.Name"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
filterCriteria	Filter Criteria[]	Filter criteria for the results.	Optional	59.0
financialGoalFields	String[]	List of developer names of the fields from the FinancialGoal object to be retrieved.	Required for 59.0, Optional for 60.0	59.0
financialGoalFundingFields	String[]	List of field developer names from the FinancialAccount object to be retrieved.	Optional	60.0
financialGoalPartyFields	String[]	List of field developer names from the FinancialGoalParty object to be retrieved.	Optional	59.0
limit	Integer	Maximum number of financial goals returned in each response.	Optional	59.0
offset	Integer	Offset for paging through returned financial goals.	Optional	59.0
orderBy	String	Fully qualified developer name of the field used to sort the results.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
sortBy	String	Sort the results by Asc or Desc order.	Optional	59.0

Financial Input

Input details for the financial transaction.

Root XML tag

`<financials>`

JSON example

```
{
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "financeMortgageInsuranceAmt": 353,
      "hasCompletedCounseling": true,
      "hasHomeownerEducation": true,
      "homeEdCompletedBorrowerName": "BR1",
      "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
      "homeownerEdFormat": "Attended Workshop in Person",
      "housingCounselingFormat": "Face-to-Face",
      "hudApproveAgencyId": "12344",
      "hudApprovedProviderId": "3532",
      "landAcquiredSeparatelyAmount": 2040,
      "loanAmtExclFinMortgageInsurance": 33345,
      "name": "Fin1",
      "otherCredit": 2242,
      "otherNewMortgageLoanAmt": 253535,
    }
  ]
}
```

```

        "outstandingLoanAmount": 24505056,
        "purchasePriceAmount": 150000,
        "remodelAndRepairsAmount": 3040
    }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>borrowerClosingCostAmount</code>	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Optional	48.0
<code>counselingAgencyName</code>	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
<code>counselorProviderName</code>	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
<code>counselingCompletionName</code>	String	Name of borrower or borrowers who completed housing counseling.	Optional	48.0
<code>counselingCompletionDate</code>	Date	Date borrower completed housing counseling.	Optional	48.0
<code>creditFromSeller</code>	Double	Total amount of closing costs due from seller.	Optional	48.0
<code>discountPointCostAmount</code>	Double	Total cost of discount points purchased by the borrower due at closing.	Optional	48.0
<code>estFirstMortgagePayment</code>	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Optional	48.0
<code>estHomeownersPayment</code>	Double	Proposed monthly payment for homeowners insurance on application property.	Optional	48.0
<code>estMortgageInsurancePayment</code>	Double	Proposed monthly mortgage insurance payment on application property.	Optional	48.0
<code>estOtherDuesPayment</code>	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Optional	48.0
<code>estOtherPayment</code>	Double	Proposed total monthly payment for other housing expenses on application property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
estPropertyTaxPaynt	Double	Proposed monthly payment for real estate taxes on application property.	Optional	48.0
estTotalLiensPaynt	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Optional	48.0
estSuppInsurancePaynt	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Optional	48.0
extendedFields	Extended Fields Input []	Custom fields related to the transaction.	Optional	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
financedMortgage	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Optional	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Optional	48.0
homeOwnerBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Optional	48.0
homeownerCompleteDate	Date	Date borrower completed homeownership education.	Optional	48.0
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Optional	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Optional	48.0
hudApprovedAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
id	String	ID of the loan application financial.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
landPurchaseAmount	Double	Price of land if purchased separately from the building or structure.	Optional	48.0
landFinancingAmount	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
name	String	Name of the loan application financial.	Optional	48.0
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Optional	48.0
otherNewMortgageAmount	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Optional	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Optional	48.0
purchasePriceAmount	Double	Purchase price for the property.	Optional	48.0
renovationRepairAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Optional	48.0

Generic Object Wrapper

Input representation of additional details of the case, case participant, or complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
value	Object	Additional details of the case, case participant, or complaint.	Optional	58.0

Liability Input

Details about the borrower and co-borrower current liabilities.

Root XML tag

```
<liabilities>
```

JSON example

```
{
  "liabilities": [
    {
      "accountNumber": "134234242",
      "amount": 1234567890
    }
  ]
}
```

```

"accountType": "Revolving",
"borrowersExternalIds": [
  "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
  "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
],
"creditLimitAmount": 34353,
"creditorName": "BOFA",
"extendedFields": [],
"externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
"isJointLiability": true,
"liabilityClass": "Financial",
"loanType": "Conventional",
"monthlyPaymentAmount": 35353,
"name": "Liabl",
"otherLiabilityType": "Child Support",
"shouldBePaidInFull": true,
"unpaidBalanceAmount": 242
},
{
  "accountNumber": "464634123",
  "accountType": "Revolving",
  "borrowersExternalIds": [
    "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
    "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
  ],
  "creditLimitAmount": 423465356,
  "creditorName": "CHase",
  "extendedFields": [],
  "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
  "isJointLiability": true,
  "liabilityClass": "Financial",
  "loanType": "Conventional",
  "monthlyPaymentAmount": 2423535,
  "name": "Liab2",
  "otherLiabilityType": "Alimony",
  "shouldBePaidInFull": true,
  "unpaidBalanceAmount": 553
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountNumber	String	Borrower's account number with lender or creditor.	Optional	48.0
accountType	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Optional	48.0
assetExternalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
assetId	String	ID of the asset.	Optional	48.0
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Optional	48.0
borrowersIds	String[]	IDs of the borrowers.	Optional	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Optional	48.0
creditorName	String	Lender or creditor owed the debt.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Optional	48.0
id	String	ID of the liability.	Optional	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Optional	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Optional	48.0
loanType	String	Existing real estate loan type.	Optional	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Optional	48.0
name	String	Name of the liability.	Optional	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Optional	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Optional	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Optional	48.0

Mapper Input Representation

Represents the input representation for the Mapper POST method.

JSON example

```
{
  "recordId": "0cdB000000CbVGIA0"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordID	String	ID of the residential loan application.	Required	49.0

Mortgage Input

Represents the input for mortgage POST or PATCH method.

JSON example

```
{
  "accountId": "001RM000004XraFYAS",
  "amortizationTerm": 30,
  "amortizationType": "Adjustable Rate",
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": []
    }
  ]
}
```

```
"extendedFields": [],
"externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
"financialInstitutionName": "wells",
"grossMonthlyRentalIncome": 24242224,
"name": "Asset2",
"netMonthlyRentalIncome": 242424234,
"presentMarketValue": 2423131313,
"realEstateAddress": {
  "city": "San Francisco",
  "country": "CA",
  "street": "123 2nd Street"
},
"realEstateMonthlyExpense": 2242423424
},
],
"balloonTermMonths": 3,
"borrowers": [
{
  "addresses": [
    {
      "addressOwnership": "Own",
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "monthlyRentPayment": 2300,
      "name": "Addr1",
      "residenceAdditionalMonthCount": 23,
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94105",
        "state": "CA",
        "street": "50 Fremont Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Former Residence"
    }
  ],
  "asianRaceSubType": "Asian Indian",
  "borrowerType": "Borrower",
  "citizenshipStatus": "U.S. Citizen",
  "declarations": [
    {
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "isDebtSettled": false
    }
  ],
  "employmentStatus": "Employed"
}
]
```

```
        "hasUndisclosedAddCreditApp": true,
        "hasUndisclosedOtherPropLoan": true,
        "isPartyToLawsuit": true,
        "isPresentlyDelinquent": true,
        "isPrimaryResidence": true,
        "isRelatedToSeller": true,
        "name": "Decl1",
        "priorPropertyTitleType": "Yourself",
        "priorPropertyUsageType": "Secondary Residence"
    }
],
"dependentCount": 2,
"dependentsAge": "25,34",
"employments": [
{
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 4,
    "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
    },
    "extendedFields": [],
    "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
    "isRelToTransactionParty": true,
    "isLessThanQuarterShare": true,
    "isSelfEmployed": true,
    "jobTitle": "developer",
    "monthlyBaseIncomeAmount": 2300,
    "monthlyBonusAmount": 100,
    "monthlyCommissionAmount": 10,
    "monthlyIncome": 5000,
    "monthlyMilitaryEntitlementAmt": 20,
    "monthlyOtherIncomeAmount": 10,
    "monthlyOvertimeAmount": 200,
    "name": "Empl1",
    "startDate": "2019-10-10T03:11:27.000Z"
}
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Not Hispanic or Latino",
"extendedFields": [],
"externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
{
    "extendedFields": [],
    "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
    "incomeSourceType": "Capital Gains",
    "monthlyIncomeAmount": 100,
    "name": "Income1"
}
```

```

        }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 2,
    "militaryTourExpirationYear": 2027,
    "name": "BR1",
    "otherAsianRaceSubType": "Indian",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
},
{
    "addresses": [
        {
            "addressOwnership": "Rent",
            "extendedFields": [],
            "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
            "monthlyRentPayment": 5000,
            "name": "Addr2",
            "residenceAdditionalMonthCount": 24,
            "residenceAddress": {
                "city": "San Francisco",
                "country": "United States",
                "postalCode": "94115",
                "state": "CA",
                "street": "1500 Divisadero Street"
            },
            "residenceYearCount": 3,
            "residencyType": "Present Address"
        }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
        {
            "bankruptcyType": "Chapter 12",
            "borrowedAmount": 657575,
            "extendedFields": [],
            "externalId": "704e7cf9-932c-4a17-81ad-844fe1a007c6",
            "hasBorrowedMoney": true,
            "hasCoSignerUndisclosedDebt": true,
            "hasDeclaredBankruptcy": true,
            "hasDeedSurrender": true,
            "hasOutstandingJudgement": true,
            "hasOwnershipInterest": true,
        }
    ]
}

```

```
        "hasPastShortSale": true,
        "hasPropertyForeclosed": true,
        "hasUndisclosedAddCreditApp": true,
        "hasUndisclosedOtherPropLoan": true,
        "isPartyToLawsuit": true,
        "isPresentlyDelinquent": true,
        "isPrimaryResidence": true,
        "isRelatedToSeller": true,
        "name": "Decl1",
        "priorPropertyTitleType": "Yourself",
        "priorPropertyUsageType": "Primary Residence"
    }
],
"dependentCount": 2,
"dependentsAge": "34,35",
"employments": [
{
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 3,
    "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
    },
    "extendedFields": [],
    "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
    "isRelToTransactionParty": true,
    "isLessThanQuarterShare": true,
    "isSelfEmployed": true,
    "jobTitle": "developer",
    "monthlyBaseIncomeAmount": 2400,
    "monthlyBonusAmount": 234,
    "monthlyCommissionAmount": 10,
    "monthlyIncome": 45668,
    "monthlyMilitaryEntitlementAmt": 20,
    "monthlyOtherIncomeAmount": 394,
    "monthlyOvertimeAmount": 123,
    "name": "Empl2",
    "startDate": "2019-10-10T03:11:27.000Z"
}
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Hispanic or Latino",
"extendedFields": [],
"externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
{
    "extendedFields": [],
    "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
    "incomeSourceType": "Child Support",

```

```
        "monthlyIncomeAmount": 200,
        "name": "Income1"
    }
],
"isActiveMilitary": true,
"isJointCredit": true,
"isSurvivingMilitarySpouse": true,
"maritalStatus": "Married",
"militaryTourExpirationMonth": 3,
"militaryTourExpirationYear": 2029,
"name": "COB1",
"otherAsianRaceSubType": "South india",
"otherEthnicitySubType": "Mexico",
"otherPacIslandSubType": "Test pacific Islander",
"pacificIslanderSubType": "Guamanian or Chamorro",
"preferredLanguage": "English",
"raceType": "American Indian or Alaska Native",
"tribeName": "Pacific Islander",
"wasActiveMilitary": true,
"wasNonActivatedService": true
}
],
"estateHoldType": "Fee Simple",
"extendedFields": [],
"externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
"financials": [
{
    "borrowerClosingCostAmt": 95956,
    "counselingAgencyProviderName": "Test provider",
    "counselingCompleteBorrName": "BR1",
    "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
    "creditFromSeller": 33342,
    "discountPointCostAmount": 59586,
    "estFirstMortgagePayment": 459677,
    "estHomeownerInsurancePayment": 35521,
    "estMortgageInsurancePayment": 2424555,
    "estOtherDuesPayment": 24354,
    "estOtherPayment": 323231,
    "estPropertyTaxesPayment": 422556,
    "estSubordinateLienPayment": 35453,
    "estSuppPropInsurancePayment": 44959,
    "extendedFields": [],
    "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
    "financeMortgageInsuranceAmt": 353,
    "hasCompletedCounseling": true,
    "hasHomeownerEducation": true,
    "homeEdCompletedBorrowerName": "BR1",
    "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
    "homeownerEdFormat": "Attended Workshop in Person",
    "housingCounselingFormat": "Face-to-Face",
    "hudApproveAgencyId": "12344",
    "hudApprovedProviderId": "3532",
    "landAcquiredSeparatelyAmount": 2040,
    "loanAmtExclFinMortgageInsurance": 33345,
    "mortgageInsuranceType": "Mortgage Insurance"
}
]
```

```
        "name": "Fin1",
        "otherCredit": 2242,
        "otherNewMortgageLoanAmt": 253535,
        "outstandingLoanAmount": 24505056,
        "purchasePriceAmount": 150000,
        "remodelAndRepairsAmount": 3040
    },
],
"hasOtherLoanFeature": true,
"hasPrepaymentPenalty": true,
"improvementCost": 100,
"initialBuydownRate": 401,
"interestOnlyMonthCount": 4,
"interestRate": 4,
"isBalloon": true,
"isBorrowerInCommunityPropState": true,
"isConstructionToPermanent": true,
"isContractForDeed": true,
"isEnergyRelatedImprovement": true,
"isInterestOnly": true,
"isNegativeAmortization": true,
"isPropInCommunityPropState": true,
"isRenovation": true,
"isSingleClosing": true,
"isSubjectToPriorityLien": true,
"isTempIntRateBuydown": true,
"leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
"liabilities": [
    {
        "accountNumber": "134234242",
        "accountType": "Revolving",
        "borrowersExternalIds": [
            "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
            "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
        ],
        "creditLimitAmount": 34353,
        "creditorName": "BOFA",
        "extendedFields": [],
        "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
        "isJointLiability": true,
        "liabilityClass": "Financial",
        "loanType": "Conventional",
        "monthlyPaymentAmount": 35353,
        "name": "Liab1",
        "otherLiabilityType": "Child Support",
        "shouldBePaidInFull": true,
        "unpaidBalanceAmount": 242
    },
    {
        "accountNumber": "464634123",
        "accountType": "Revolving",
        "borrowersExternalIds": [
            "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
            "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
        ]
    }
]
```

```
  ],
  "creditLimitAmount": 423465356,
  "creditorName": "CHase",
  "extendedFields": [],
  "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
  "isJointLiability": true,
  "liabilityClass": "Financial",
  "loanType": "Conventional",
  "monthlyPaymentAmount": 2423535,
  "name": "Liab2",
  "otherLiabilityType": "Alimony",
  "shouldBePaidInFull": true,
  "unpaidBalanceAmount": 553
}
],
"loanPurpose": "Purchase",
"lotAcquiredDate": "2019-10-31T19:00:00.000Z",
"lotOriginalCost": 200.3,
"monthsBeforeFirstAdj": 2,
"monthsBetweenAdjustments": 3,
"mortgageLienType": "First Lien",
"mortgageProgramType": "Conventional",
"name": "Loan1",
"nativeLandTenure": "Fee Simple (On a Reservation)",
"otherAmortizationType": "Test Amortization type",
"otherLoanFeature": "Test Loan Feature",
"otherLoanPurpose": "Test Loan Purpose",
"otherMortgageProgramType": "Test program",
"otherRefinanceProgType": "Test Refinance",
"prepayPenaltyTermMonth": 5,
"projectType": "Cooperative",
"properties": [
  {
    "esMonthlyRentalIncome": 400506,
    "esNetMonthlyRentalIncome": 304056,
    "extendedFields": [],
    "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
    "isManufacturedHome": true,
    "isMixedUseProperty": true,
    "loanPurposeType": "Purchase",
    "name": "Prop1",
    "propertyUseType": "Primary Residence",
    "propertyValue": 50500555,
    "requestedLoanAmount": 5005000,
    "unitsFinancedCount": 5
  }
],
"refinanceProgramType": "Full Documentation",
"refinanceType": "No Cash Out",
"status": "New",
"titleHolders": [
  {
    "extendedFields": [],
    "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
    "name": "Prop1"
  }
]
```

```

        "isCurrentTitleHolder": true,
        "name": "T1",
        "titleHolderName": "Times"
    }
],
"titleType": "Joint Tenancy with Right of Survivorship",
"trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	Account associated with the application.	Required if opportunityId isn't provided	48.0
amortizationTerm	Integer	Duration of the amortization in months.	Optional	48.0
amortizationType	String	Amortization type for loan.	Optional	48.0
assets	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0
balloonTermMonths	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
borrowers	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
extendedFields	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
financials	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isCommunityProp	Boolean	Indicates whether borrower lives in a community property state.	Optional	48.0
isConstructionRemain	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isCommunityProp	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
leaseholdExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBeforeAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if accountId isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgramType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input[]	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Property Input

Represents details of the property the loan application finances.

Root XML tag

<properties>

JSON example

```
{
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
estimatedMonthlyRentalIncome	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Optional	48.0
estimatedNetMonthlyRentalIncome	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Optional	48.0
extendedFields	Extended Fields Input []	Custom fields related to the property.	Optional	48.0
externalId	String	Identifier assigned to imported property data by external data source (if applicable).	Optional	48.0
id	String	ID of the property.	Optional	48.0
isManufacturedHome	Boolean	Indicates whether application property is a manufactured home.	Optional	48.0
isMixedUseProperty	Boolean	Indicates whether application property includes commercial space set aside for business use.	Optional	48.0
loanPurposeType	String	What the borrower will use the loan for.	Optional	48.0
name	String	Name of loan application property.	Optional	48.0
propertyAddress	Address Input []	Physical address of the property to be financed.	Optional	48.0
propertyUseType	String	Borrower's stated use for the property.	Optional	48.0
propertyValue	Double	Estimated present market value of the application property.	Optional	48.0
requestedLoanAmount	Double	Total loan amount the borrower is applying for.	Optional	48.0
unitsFinancedCount	Integer	Number of units being financed at this address.	Optional	48.0

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Root XML tag

```
<titleHolders>
```

JSON example

```
{
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extendedFields	Extended Fields Input[]	Custom fields related to the title holder.	Optional	48.0
externalId	String	Identifier assigned to imported title holder data by external data source (if applicable).	Optional	48.0
id	String	ID of the title holder.	Optional	48.0
isCurrentTitleHolder	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Optional	48.0
name	String	Name of the loan application title holder.	Optional	48.0
titleHolderName	String	Name of the person on the title for the property associated with the loan application.	Optional	48.0

Response Bodies

Here's a list of Financial Services Cloud Business API response bodies.

[Address Output](#)

Represents address details.

[Asset Output](#)

Represents details about the borrower's and co-borrower's current personal and real property.

[Asset Result](#)

Asset result of the POST or PATCH request.

[Borrower Address Output](#)

Represents Borrower addresses.

[Borrower Address Result](#)

Borrower address result of the POST or PATCH request.

[Borrower Declaration Output](#)

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

[Borrower Declaration Result](#)

Result containing details about borrower's declaration.

[Borrower Employment Output](#)

Represents details about the borrower's or co-borrower's current and past employment.

[Borrower Employment Result](#)

Borrower employment result of the POST or PATCH request.

[Borrower Income Output](#)

Represents details about the borrower and co-borrower current monthly income.

[Borrower Income Result](#)

Borrower income result of the POST or PATCH request.

[Borrower Output](#)

Represents details of the borrower or co-borrower for the loan application.

[Borrower Result](#)

Borrower result of the POST or PATCH request.

[Complaint Management Output](#)

Output representation of the created public complaint.

[Ethoca Alert Callback Output](#)

Ethoca alert callback output for dispute management.

[Extended Fields Output](#)

Represents custom fields names and values.

[Financial Goal Details Output](#)

Queried financial goal details.

[Financial Goal Funding Output](#)

Output for Financial Goal funding.

[Financial Goal Party Output](#)

Output for Financial Goal Parties.

[Financial Goal Patch Output](#)

Updated financial goal.

[Financial Goals Create Output](#)

Container for created financial goals and goal members.

[Financial Goals Create Result](#)

Created financial goals and goal members.

[Financial Goals List Output](#)

Queried financial goals.

[Financial Output](#)

Output details for the financial transaction.

[Financial Result](#)

Financial result of the POST or PATCH request.

[Liability Output](#)

Details about the borrower and co-borrower current liabilities.

[Liability Result](#)

Liability result of the POST or PATCH request.

[Mapper Result](#)

Represents the Mapper result.

[Mapper Result Representation](#)

Represents the result representation of the POST method.

[Mortgage Information Output](#)

Represents the output of the GET method.

[Mortgage Information Response](#)

Response for the GET method.

[Mortgage Response](#)

Response for the POST or PATCH method.

[Mortgage Result](#)

Represents the result of the POST or PATCH method.

[Property Result](#)

Property result of the POST or PATCH request.

[Property Output](#)

Represents details of the property the loan application finances.

[Record Alert](#)

Output representation of the details of a record alert.

[Record Alert Collection](#)

Output representation of a collection of record alerts.

[Record Alert Collection Map](#)

Output representation of the bulk record alerts request.

[Record Alert Action Info](#)

Output representation of the information of the record alert action.

[Record Alert Action Info Collection](#)

Output representation of the details of an action on the record alert.

[Title Holder Output](#)

Represents details of borrowers who are applying to hold title to the property the loan application finances.

[Title Holder Result](#)

Title holder result of the POST or PATCH request.

[Retrieval Summary Result](#)

Output representation of a retrieval summary definition call.

[Retrieval Summary Result Node](#)

Output representation of the result of a retrieval summary definition call.

[Retrieval Summary Result Record](#)

Output representation of a record for the result of a retrieval summary definition call.

[Retrieval Summary Result Root Node](#)

Output representation of the result of a retrieval summary definition call.

Address Output

Represents address details.

Property Name	Type	Description	Filter Group and Version	Available Version
city	String	The address city.	Small, 48.0	48.0
country	String	The address country.	Small, 48.0	48.0
postalCode	String	The address postal code.	Small, 48.0	48.0
state	String	The address state.	Small, 48.0	48.0
street	String	The address street.	Small, 48.0	48.0

Asset Output

Represents details about the borrower's and co-borrower's current personal and real property.

Property Name	Type	Description	Filter Group and Version	Available Version
accountNumber	String	Account number associated with financial institution holding asset.	Small, 48.0	48.0
accountType	String	Identifies asset account type.	Small, 48.0	48.0
assetClass	String	Identifies which asset class total to include the asset's value in.	Small, 48.0	48.0
assetType	String	Identifies type of other asset.	Small, 48.0	48.0
borrowersExternalIds	String[]	External IDs of borrower and co-borrowers.	Big, 48.0	48.0
borrowersIds	String[]	IDs of borrower and co-borrowers.	Big, 48.0	48.0
cashOrMarketValue	Double	Asset's cash or current market value.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
dispositionType	String	Real estate asset's planned future use.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields related to the asset.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
<code>financialInstitutionName</code>	String	Name of financial institution where financial account is held.	Small, 48.0	48.0
<code>grossMonthlyRentalIncome</code>	Double	Borrower's monthly rent income collected on real estate asset.	Small, 48.0	48.0
<code>id</code>	String	ID of the asset.	Small, 48.0	48.0
<code>isDeleted</code>	Boolean	Indicates whether the asset record is deleted.	Small, 48.0	48.0
<code>isJointAsset</code>	Boolean	Indicates asset is held jointly.	Small, 48.0	48.0
<code>lastModifiedById</code>	String	ID of the user who last modified this record.	Small, 48.0	48.0
<code>lastModifiedDate</code>	String	Date and time when a user last modified this record.	Small, 48.0	48.0
<code>lastReferencedDate</code>	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
<code>lastViewedDate</code>	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
<code>loanApplicationId</code>	String	ID of the loan application record.	Small, 48.0	48.0
<code>name</code>	String	Name of the loan application asset.	Small, 48.0	48.0
<code>netMonthlyRentalIncome</code>	Double	Borrower's net monthly income on real estate asset.	Small, 48.0	48.0
<code>ownerId</code>	String	ID of the user who owns this record.	Small, 48.0	48.0
<code>presentMarketValue</code>	Double	Cash value of real estate asset if sold today.	Small, 48.0	48.0
<code>realEstateAddress</code>	Address Output []	Real estate asset's address.	Small, 48.0	48.0
<code>realEstateMonthlyExpense</code>	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Small, 48.0	48.0
<code>systemModstamp</code>	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Asset Result

Asset result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Address Output

Represents Borrower addresses.

Property Name	Type	Description	Filter Group and Version	Available Version
addressOwnership	String	Identifies borrower's status at residence.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields related to the borrower's address.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Small, 48.0	48.0
id	String	ID of the borrower's address	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the borrower record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the borrower record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Small, 48.0	48.0
name	String	Name of the borrower's address.	Small, 48.0	48.0
residentialMonths	Integer	Additional months borrower lived at this residence.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
residenceAddress	Address Output []	Residence's physical address.	Small, 48.0	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Small, 48.0	48.0
residencyType	String	Identifies borrower's current residency status.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Address Result

Borrower address result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Declaration Output

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

Property Name	Type	Description	Filter Group and Version	Available Version
bankruptcyType	String	Bankruptcy type or types (if applicable).	Small, 48.0	48.0
borrowedAmount	Double	Amount of money borrowed for loan application transaction.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields related to the financial transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported declaration data by external data source (if applicable).	Small, 48.0	48.0
hasBorrowedMoney	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Small, 48.0	48.0
hasSignedDisclosure	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
<code>hasDeclaredBankruptcy</code>	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Small, 48.0	48.0
<code>hasDeedSurrender</code>	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Small, 48.0	48.0
<code>hasOutstandingJudgment</code>	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Small, 48.0	48.0
<code>hasOwnershipInterest</code>	Boolean	Indicates whether borrower had ownership interest in a property in the last three years.	Small, 48.0	48.0
<code>hasPastShortSale</code>	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past seven years.	Small, 48.0	48.0
<code>hasPropertyForeclosed</code>	Boolean	Indicates whether borrower had property foreclosed upon in last seven years.	Small, 48.0	48.0
<code>hasUndisclosedDebt</code>	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Small, 48.0	48.0
<code>hasUndisclosedMortgage</code>	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Small, 48.0	48.0
<code>id</code>	String	ID of the borrower declaration.	Small, 48.0	48.0
<code>isDeleted</code>	Boolean	Indicates whether the declaration record is deleted.	Small, 48.0	48.0
<code>isPartyToLawsuit</code>	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Small, 48.0	48.0
<code>isPresentlyDelinquent</code>	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Small, 48.0	48.0
<code>isPrimaryResidence</code>	Boolean	Indicates whether property is to be borrower's primary residence.	Small, 48.0	48.0
<code>isRelatedToSeller</code>	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
<code>isSubjectToPriorityLien</code>	Boolean	Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	Small, 48.0	48.0
<code>lastModifiedById</code>	String	ID of the user who last modified this record.	Small, 48.0	48.0
<code>lastModifiedDate</code>	String	Date and time when a user last modified this record.	Small, 48.0	48.0
<code>lastReferencedDate</code>	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
<code>lastViewedDate</code>	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
<code>loanApplicantId</code>	String	ID of the loan applicant record.	Small, 48.0	48.0
<code>loanApplicationId</code>	String	ID of the loan application record.	Small, 48.0	48.0
<code>name</code>	String	Name of the declaration.	Small, 48.0	48.0
<code>ownerId</code>	String	ID of the user who owns the record.	Small, 48.0	48.0
<code>priorPropertyTitleType</code>	String	Identifies how borrower held title in the ownership interest property.	Small, 48.0	48.0
<code>priorPropertyUsageType</code>	String	Identifies type of property borrower held ownership interest in.	Small, 48.0	48.0
<code>systemModstamp</code>	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Declaration Result

Result containing details about borrower's declaration.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>externalId</code>	String	Identifier assigned to imported borrower data by external data source (if applicable).	Small, 48.0	48.0
<code>id</code>	String	ID of the borrower.	Small, 48.0	48.0

Borrower Employment Output

Represents details about the borrower's or co-borrower's current and past employment.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
additionalMonth	Integer	Additional number of months employed at this job (less than 12).	Small, 48.0	48.0
currentYearCount	Integer	Number of full years employed at this job.	Small, 48.0	48.0
employerAddress	Address Output []	Address of borrower's employer or business.	Small, 48.0	48.0
employerName	String	Name of borrower's employer or business.	Small, 48.0	48.0
employerPhone	String	Employer's phone number.	Small, 48.0	48.0
endDate	String	Borrower's last date of employment at this job.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields related to the borrower's employment.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported employer data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower's employment.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the employment record is deleted.	Small, 48.0	48.0
isLessThanQuarterShare	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Small, 48.0	48.0
isRelationshipParty	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Small, 48.0	48.0
isSelfEmployed	Boolean	Indicates whether borrower is self-employed or owns the business.	Small, 48.0	48.0
jobTitle	String	Borrower's job title or employer's business or industry type.	Small, 48.0	48.0
lastModifiedBy	String	ID of the user who last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the borrower record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0
monthlyCommissionAmount	Double	Borrower's monthly commission from this job.	Small, 48.0	48.0
monthlyIncome	Double	Borrower's monthly income or loss from this business.	Small, 48.0	48.0
monthlyEntitlement	Double	Borrower's monthly military entitlement from this job.	Small, 48.0	48.0
monthlyOtherIncome	Double	Borrower's other monthly income from this job.	Small, 48.0	48.0
monthlyOvertimeIncome	Double	Borrower's monthly overtime income from this job.	Small, 48.0	48.0
monthlyTotalIncome	Double	Borrower's monthly total income from this job.	Total Monthly Income	Small, 48.0
name	String	Name of the loan applicant employment.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0
startDate	String	Name of the loan applicant employment.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower employment Result

Borrower employment result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Income Output

Represents details about the borrower and co-borrower current monthly income.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields related to the income.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the income.	Small, 48.0	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the income record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the loan applicant record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Small, 48.0	48.0
name	String	Name of the other monthly income.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Income Result

Borrower income result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Output

Represents details of the borrower or co-borrower for the loan application.

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Borrower Address Output []	Borrower's addresses.	Big, 48.0	48.0
asianRaceSubType	String	Borrower's Asian race.	Small, 48.0	48.0
borrowerType	String	Applicant's borrower type.	Small, 48.0	48.0
citizenshipStatus	String	Borrower's citizenship status.	Small, 48.0	48.0
contactId	String	Contact associated with this borrower.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
declarations	Borrower Declaration Output []	Borrower's declarations.	Big, 48.0	48.0
dependentCount	Integer	Borrower's number of dependents.	Small, 48.0	48.0
dependentsAge	String	Ages of borrower's dependents in a comma-separated list.	Small, 48.0	48.0
employments	Borrower Employment Output []	Borrower's employments.	Big, 48.0	48.0
ethnicitySubType	String	Borrower's ethnicity.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
ethnicityType	String	Borrower's ethnicity origin.	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Custom fields.	Big, 48.0	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
genderType	String	Borrower's gender.	Small, 48.0	48.0
hasMilitaryService	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.	Small, 48.0	48.0
id	String	ID of the Borrower.	Small, 48.0	48.0
incomes	Borrower Income Output []	Borrower's incomes.	Big, 48.0	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Small, 48.0	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
maritalStatus	String	Borrower's marital status.	Small, 48.0	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Small, 48.0	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Small, 48.0	48.0
name	String	Name of the borrower.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
otherAsianRaceSubType	String	Borrower's Asian race if other is specified.	Small, 48.0	48.0
otherEthnicitySubType	String	Borrower's ethnicity if other is specified.	Small, 48.0	48.0
otherPacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
pacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race.	Small, 48.0	48.0
preferredLanguage	String	Borrower's preferred communication language.	Small, 48.0	48.0
raceType	String	Borrower's race.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Small, 48.0	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Small, 48.0	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Small, 48.0	48.0

Borrower Result

Borrower result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Borrower Address Result []	Borrower's addresses.	Big, 48.0	48.0
declarations	Borrower Declaration Result []	Borrower's declarations.	Big, 48.0	48.0
employments	Borrower employment Result []	Borrower's employments.	Big, 48.0	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the orrower.	Small, 48.0	48.0
incomes	Borrower Income Result[]	Borrower's incomes.	Big, 48.0	48.0

Complaint Management Output

Output representation of the created public complaint.

JSON example

```
{
  "caseId": "500RO000002QBFLYA4",
  "caseNumber": "00001762",
  "publicComplaintId": "PC-0000000250"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
caseId	String	ID of the case associated with the created complaint.	Big, 58.0	58.0
caseNumber	String	Case number associated with the created complaint.	Big, 58.0	58.0
publicComplaintId	String	ID of the created public complaint.	Big, 58.0	58.0

Ethoca Alert Callback Output

Ethoca alert callback output for dispute management.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Message describing whether the request was successful.	Small, 60.0	60.0
statusCode	String	HTTP status code.	Small, 60.0	60.0

Extended Fields Output

Represents custom fields names and values.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the custom field.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
value	String	Value of the custom field.	Small, 48.0	48.0

Financial Goal Details Output

Queried financial goal details.

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoalDetails	Map<String, Object>	Fields requested in the <code>financialGoalFields</code> input property and their values.	Small, 59.0	59.0
financialGoalFundings	Financial Goal Funding Output []	Fields requested in the <code>financialGoalFundingFields</code> input property and their values.	Small, 60.0	60.0
financialGoalParties	Financial Goal Party Output []	Fields requested in the <code>financialGoalPartyFields</code> input property and their values.	Small, 59.0	59.0

Financial Goal Funding Output

Output for Financial Goal funding.

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoalFundingDetails	Map<String, Object>	Map of Financial Goal funding details.	Small, 60.0	60.0

Financial Goal Party Output

Output for Financial Goal Parties.

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoalPartyDetails	Map<String, Object>	Map of Financial Goal Party details.	Small, 59.0	59.0

Financial Goal Patch Output

Updated financial goal.

Property Name	Type	Description	Filter Group and Version	Available Version
error	String	Error message if the financial goal wasn't updated successfully.	Small, 59.0	59.0
isUpdated	Boolean	Specifies whether the update succeeded.	Small, 59.0	59.0

Financial Goals Create Output

Container for created financial goals and goal members.

Property Name	Type	Description	Filter Group and Version	Available Version
results	Financial Goals Create Result []	List of goals and members or an error message.	Small, 59.0	59.0

Financial Goals Create Result

Created financial goals and goal members.

If creation is successful:

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoalId	String	ID of the financial goal.	Small, 59.0	59.0
financialGoalParties	String[]	List of member IDs.	Small, 59.0	59.0
isSuccess	Boolean	Value is <code>true</code> .	Small, 59.0	59.0

If creation is unsuccessful:

Property Name	Type	Description	Filter Group and Version	Available Version
error	String	Error message if the financial goal wasn't created successfully.	Small, 59.0	59.0
isSuccess	Boolean	Value is <code>false</code> .	Small, 59.0	59.0

Financial Goals List Output

Queried financial goals.

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoals	Financial Goal Details Output []	List of financial goals belonging to the parent record.	Small, 59.0	59.0

Financial Output

Output details for the financial transaction.

Property Name	Type	Description	Filter Group and Version	Available Version
borrowerClosingCosts	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Small, 48.0	48.0
cashFromOrToBorrower	Double	Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification.	Small, 48.0	48.0
counselingAgencyName	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingAgencyProviderName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingProviderName	String	Name of borrower or borrowers who completed housing counseling.	Small, 48.0	48.0
counselingCompletionDate	Date	Date borrower completed housing counseling.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	Date	Date and time when this record was created.	Small, 48.0	48.0
creditFromSeller	Double	Total amount of closing costs due from seller.	Small, 48.0	48.0
discountPointCosts	Double	Total cost of discount points purchased by the borrower due at closing.	Small, 48.0	48.0
estFirstMortgagePayment	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Small, 48.0	48.0
estHomeownersInsurancePayment	Double	Proposed monthly payment for homeowners insurance on application property.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
estMortgagePayment	Double	Proposed monthly mortgage insurance payment on application property.	Small, 48.0	48.0
estOtherDuesPayment	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Small, 48.0	48.0
estOtherPayment	Double	Proposed total monthly payment for other housing expenses on application property.	Small, 48.0	48.0
estPropertyTaxPayment	Double	Proposed monthly payment for real estate taxes on application property.	Small, 48.0	48.0
estSecondaryLiensPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Small, 48.0	48.0
estSupplementalPayment	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Small, 48.0	48.0
extendedFields	Extended Fields Output	Custom fields related to the transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Small, 48.0	48.0
financedMortgageAmount	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Small, 48.0	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Small, 48.0	48.0
homeownerBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Small, 48.0	48.0
homeownerCompletedDate	String	Date borrower completed homeownership education.	Small, 48.0	48.0
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Small, 48.0	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
hudApprovedAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
id	String	ID of the loan application financial.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the financial record is deleted.	Small, 48.0	48.0
landAcquisitionCost	Double	Price of land if purchased separately from the building or structure.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanAmount	Double	Total loan amount.	Small, 48.0	48.0
loanExcludedMortgage	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application financial.	Small, 48.0	48.0
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Small, 48.0	48.0
otherNewMortgageLoan	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Small, 48.0	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Small, 48.0	48.0
purchasePriceAmount	Double	Purchase price for the property.	Small, 48.0	48.0
remodelAndRepairAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
totalCashDueForBorrower	Double	Total cash due from borrower at closing.	Small, 48.0	48.0
totalCredit	Double	Total borrower credits.	Small, 48.0	48.0
totalDebtPaidOffAmount	Double	Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.	Small, 48.0	48.0
totalEstPaymentAmt	Double	Proposed total monthly payment for application property.	Small, 48.0	48.0
totalMortgageAmount	Double	Total mortgage loans plus total credits.	Small, 48.0	48.0
totalMortgageAmount	Double	Total amount of loan.	Small, 48.0	48.0

Financial Result

Financial result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Liability Output

Details about the borrower and co-borrower current liabilities.

Property Name	Type	Description	Filter Group and Version	Available Version
accountNumber	String	Borrower's account number with lender or creditor.	Small, 48.0	48.0
accountType	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Small, 48.0	48.0
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Big, 48.0	48.0
borrowersIds	String[]	IDs of the borrowers.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Small, 48.0	48.0
creditorName	String	Lender or creditor owed the debt.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the asset.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the liability.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the liability record is deleted.	Small, 48.0	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Small, 48.0	48.0
loanApplicationAssetId	String	ID of the loan application asset record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
loanType	String	Existing real estate loan type.	Small, 48.0	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Small, 48.0	48.0
name	String	Name of the liability.	Small, 48.0	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Small, 48.0	48.0

Liability Result

Liability result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Mapper Result

Represents the Mapper result.

```
{
  "assetsAndLiabilities": [
    "a03B000000735LwIAI",
    "a03B000000735LxIAI",
    "a03B000000735LyIAI"
  ],
  "customerProperties": [
    "0b8B0000000GnjdIAC"
  ],
  "errors": [],
  "financialAccounts": [
    "a0EB000000227WtMAI",
    "a0EB000000227WuMAI",
    "a0EB000000227WvMAI"
  ],
  "personAccounts": [
    "001B000001K8Zx5IAF"
  ],
  "status": "SUCCESS"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
assetsAndLiabilities	String[]	List of IDs created for AssetsAndLiabilities records.	Big, 49.0	49.0

Property Name	Type	Description	Filter Group and Version	Available Version
customerProperties	String[]	List of IDs created for CustomerProperty records.	Big, 49.0	49.0
errors	String[]	List of errors that occurred during the creation process.	Big, 49.0	49.0
financialAccounts	String[]	List of IDs created for FinancialAccount records.	Big, 49.0	49.0
personAccounts	String[]	List of IDs created for PersonAccount records.	Big, 49.0	49.0
status	String	Whether the creation process succeeded, partially succeeded, or failed.	Small, 49.0	49.0

Mapper Result Representation

Represents the result representation of the POST method.

JSON example

```
{
  "result": {
    "assetsAndLiabilities": [
      "a03B000000735LwIAI",
      "a03B000000735LxIAI",
      "a03B000000735LyIAI"
    ],
    "customerProperties": [
      "0b8B0000000GnjdIAC"
    ],
    "errors": [],
    "financialAccounts": [
      "a0EB000000227WtMAI",
      "a0EB000000227WuMAI",
      "a0EB000000227WvMAI"
    ],
    "personAccounts": [
      "001B000001K8Zx5IAF"
    ],
    "status": "SUCCESS"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Success or failure message.	Small, 49.0	49.0
result	Mapper Result on page 1165	Mapper result.	Small, 49.0	49.0

Mortgage Information Output

Represents the output of the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account associated with the application.	Small, 48.0	48.0
amortizationTerm	Double	Duration of the amortization in months.	Small, 48.0	48.0
amortizationType	String	Amortization type for loan.	Small, 48.0	48.0
assets	Asset Output []	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
balloonTermMonths	Double	Number of months during which the cumulative loan must be repaid.	Small, 48.0	48.0
borrowers	Borrower Output []	List of borrowers for the loan application.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Small, 48.0	48.0
extendedFields	Extended Fields Output []	Represents custom fields related to a loan application.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Small, 48.0	48.0
financials	Financial Output []	Represents transaction details for a loan application.	Big, 48.0	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Small, 48.0	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Small, 48.0	48.0
id	String	ID of the mortgage record.	Small, 48.0	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Small, 48.0	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Small, 48.0	48.0
interestOnlyMonthCount	Double	Number of months that loan payments are interest only.	Small, 48.0	48.0
interestRate	Double	Interest rate for loan.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Small, 48.0	48.0
isInCommunityState	Boolean	Indicates whether the borrower lives in community property state.	Small, 48.0	48.0
isConstructionPermit	Boolean	Indicates whether at least one borrower lives in a community property state.	Small, 48.0	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the record is deleted.	Small, 48.0	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Small, 48.0	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Small, 48.0	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Small, 48.0	48.0
isPropCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Small, 48.0	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Small, 48.0	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Small, 48.0	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Small, 48.0	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
leaseholdExpirationDate	String	Date when leasehold expires if land is leased.	Small, 48.0	48.0
liabilities	Liability Output	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
loanPurpose	String	Purpose of the loan.	Small, 48.0	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Small, 48.0	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Small, 48.0	48.0
monthsBeforeFirstAdj	Double	Initial period prior to first adjustment in months.	Small, 48.0	48.0
monthsBetweenAdjustments	Double	Number of months before the first rate adjustment for an adjustable rate loan.	Small, 48.0	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Small, 48.0	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Small, 48.0	48.0
name	String	Name of the residential loan application.	Small, 48.0	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Small, 48.0	48.0
opportunityId	String	Opportunity associated with the application.	Small, 48.0	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Small, 48.0	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Small, 48.0	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Small, 48.0	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Small, 48.0	48.0
otherRefinanceProgramType	String	Refinance program name if other was specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
<code>prepayPenaltyTermInMonth</code>	Double	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
<code>projectType</code>	String	Specifies the type of project that the property belongs to.	Small, 48.0	48.0
<code>properties</code>	Property Output []	Represents details of the property the loan application finances.	Big, 48.0	48.0
<code>refinanceProgramType</code>	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Small, 48.0	48.0
<code>refinanceType</code>	String	Refinance loan type.	Small, 48.0	48.0
<code>status</code>	String	Indicates the current status of the loan application.	Small, 48.0	48.0
<code>systemModstamp</code>	String	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Small, 48.0	48.0
<code>titleHolders</code>	Title Holder Output []	Way the borrower or borrowers take title for the loan.	Big, 48.0	48.0
<code>titleType</code>	String	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
<code>totalFinancialLiabilityAmount</code>	Double	Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.	Small, 48.0	48.0
<code>totalFinancialAssetAmount</code>	Double	Total amount of borrowers' financial account assets excluding real estate.	Small, 48.0	48.0
<code>totalOtherAssetAmount</code>	Double	Total amount of borrowers' other assets excluding real estate.	Small, 48.0	48.0
<code>totalOtherLiabilityAmount</code>	Double	Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.	Small, 48.0	48.0
<code>trustTitleType</code>	String	Title to be held in a living trust or a land trust.	Small, 48.0	48.0

Mortgage Information Response

Response for the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Information Output	Data of the mortgage result.	Small, 48.0	48.0

Mortgage Response

Response for the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Result	Representation of mortgage result.	Small, 48.0	48.0

Mortgage Result

Represents the result of the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
assets	Asset Result	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
borrowers	Borrower Result	Represents details about the borrowers and co-borrowers.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported title holder data by external data source(if applicable).	Small, 48.0	48.0
financials	Financial Result	Represents transaction details for a loan application.	Big, 48.0	48.0
id	String	ID of the loan application.	Small, 48.0	48.0
liabilities	Liability Result	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
properties	Property Result	Represents details of the property the loan application finances.	Big, 48.0	48.0
titleHolders	Title Holder Result	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Big, 48.0	48.0

Property Result

Property result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Property Output

Represents details of the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
esMonthlyRentalIncome	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Small, 48.0	48.0
enMonthlyRentalIncome	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the property.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported property data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the property.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the property record is deleted.	Small, 48.0	48.0
isManufacturedHome	Boolean	Indicates whether application property is a manufactured home.	Small, 48.0	48.0
isMixedUseProperty	Boolean	Indicates whether application property includes commercial space set aside for business use.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
loanPurposeType	String	What the borrower will use the loan for.	Small, 48.0	48.0
name	String	Name of loan application property.	Small, 48.0	48.0
propertyAddress	Address Output	Physical address of the property to be financed.	Small, 48.0	48.0
propertyUseType	String	Borrower's stated use for the property.	Small, 48.0	48.0
propertyValue	Double	Estimated present market value of the application property.	Small, 48.0	48.0
requestedLoanAmount	Double	Total loan amount the borrower is applying for.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
unitsFinancedCount	Integer	Number of units being financed at this address.	Small, 48.0	48.0

Record Alert

Output representation of the details of a record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
actions	Record Alert Action Info Collection	Represents the details of an action taken on a record alert.	Small, 54.0	54.0
active	Boolean	Indicates whether a record alert is active (true) or not (false).	Small, 54.0	54.0
description	String	The description of a record alert.	Small, 54.0	54.0
effectiveDate	String	The start date and time from when an active record alert is in effect.	Small, 54.0	54.0
id	String	The record alert ID.	Small, 54.0	54.0
parentId	String	The parent ID of a record alert.	Small, 54.0	54.0
recordAlertCategoryName	String	The category name of a record alert.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
severity	String	<p>Indicates the degree of impact of a record alert.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>Error</code> • <code>Info</code> • <code>Warning</code> 	Small, 54.0	54.0
source	String	<p>Identifies the source system that generated the record alert.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>External</code> • <code>Internal</code> 	Small, 54.0	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	Small, 54.0	54.0
subject	String	The subject line of a record alert.	Small, 54.0	54.0
validUntilDate	String	The date and time from when a record alert is no longer valid.	Small, 54.0	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	Small, 54.0	54.0

Record Alert Collection

Output representation of a collection of record alerts.

Property Name	Type	Description	Filter Group and Version	Available Version
recordAlerts	Record Alert[]	Represents the details of a record alert.	Small, 54.0	54.0

Record Alert Collection Map

Output representation of the bulk record alerts request.

JSON example

```
{
  "hasErrors": true,
  "results": {
    "001R0000003KPW0YAO": {
      "recordAlertErrors": [
        {}
      ],
    }
  }
}
```

```
"recordAlerts": [
  {
    "actions": {
      "actionInfoCollection": [
        {
          "actionName": "snooze",
          "parameters": [
            "snoozeUntilDate"
          ]
        },
        {
          "actionName": "dismiss",
          "parameters": []
        }
      ]
    },
    "active": true,
    "description": "Alert Description",
    "effectiveDate": "2022-03-10T20:00:00.000Z",
    "id": "0qZRO0000000008o",
    "severity": "Error",
    "snoozeUntilDate": "2022-03-12T19:09:06.000Z",
    "source": "Internal",
    "subject": "Alert Subject",
    "validUntilDate": "2022-03-30T19:00:00.000Z",
    "whatId": "001R0000003KPW0"
  }
],
"status": "SUCCESS"
},
"001R0000003NJJrYAO": {
  "recordAlertErrors": [
    {
      "errorCode": "Apex_Execution_Error",
      "errorMessage": "Insufficient access to record"
    }
  ],
  "recordAlerts": [
    {
      "actions": {
        "actionInfoCollection": [
          {
            "actionName": "snooze",
            "parameters": [
              "snoozeUntilDate"
            ]
          },
          {
            "actionName": "dismiss",
            "parameters": []
          }
        ]
      },
      "active": true,
```

```

    "description": "Alert Description",
    "effectiveDate": "2022-03-08T20:00:00.000Z",
    "id": "0qZRO000000000BO",
    "severity": "Info",
    "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
    "source": "Internal",
    "subject": "Alert Subject",
    "validUntilDate": "2022-03-31T19:00:00.000Z",
    "whatId": "001R000003NJJr"
  }
]
},
"status": "PARTIAL_SUCCESS"
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
hasErrors	Boolean	Indicates whether at least one of the results in the result set contains an error (<code>true</code>) or not (<code>false</code>).	Small, 55.0	55.0
results	Map<String, Record Alert Collection>	Represents the collection of record alerts.	Small, 55.0	55.0

Record Alert Action Info

Output representation of the information of the record alert action.

Property Name	Type	Description	Filter Group and Version	Available Version
actionName	String	The name of the action performed on a record alert. Possible values are: <ul style="list-style-type: none">• Dismiss• Snooze	Small, 54.0	54.0
parameters	String[]	List of parameters specified for the record alert action.	Small, 54.0	54.0

Record Alert Action Info Collection

Output representation of the details of an action on the record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
actionInfoCollection	Record Alert Action Info[]	Represents the action details of a record alert.	Small, 54.0	54.0

Title Holder Output

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the title holder.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported title holder data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the title holder.	Small, 48.0	48.0
isCurrentTitleHolder	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application title holder.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
titleHolderName	String	Name of the person on the title for the property associated with the loan application.	Small, 48.0	48.0

Title Holder Result

Title holder result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Retrieval Summary Result

Output representation of a retrieval summary definition call.

JSON Example

Property Name	Type	Description	Filter Group and Version	Available Version
lastRefreshDate	Long	Last refresh date of the rollups.	Small, 61.0	61.0
rootNode	Retrieval Summary Result Root Node	Developer name of the fields.	Small, 61.0	61.0

Retrieval Summary Result Node

Output representation of the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
label	String	Label of a node.	Small, 61.0	61.0
name	String	Name of a node.	Small, 61.0	61.0
records	Retrieval Summary Result Record[]	Record on a node.	Small, 61.0	61.0
type	String	Type of the node.	Small, 61.0	61.0

Retrieval Summary Result Record

Output representation of a record for the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
fields	Map<String, Object>	Fields on a record.	Small, 61.0	61.0

Retrieval Summary Result Root Node

Output representation of the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
children	Retrieval Summary Result Node []	Child nodes of a root node.	Small, 61.0	61.0
fields	Map<String, Object>	Fields on a root node.	Small, 61.0	61.0
name	String	Object of the root node.	Small, 61.0	61.0
type	String	Type of the root node.	Small, 61.0	61.0

FINANCIAL SERVICES CLOUD METADATA API

AccountRelationshipShareRule

Represents the rule that determines which object records are shared, how they are shared, the account relationship type that shares the records, and the level of access granted to the records.

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

AccountRelationshipShareRule

The FSC Insurance permission set in Financial Services Cloud exposes additional values for the `accountToCriteriaField` and `entityType` fields on the `AccountRelationshipShareRule` metadata type.

Field Name	Field Type	Description
<code>accountToCriteriaField</code>	string	<p>Criteria that must be met for the data to be shared. This field shows these additional values for Insurance for Financial Services Cloud.</p> <ul style="list-style-type: none">• <code>BusinessMilestone.OwnerId</code>• <code>BusinessMilestone.PrimaryAccountId</code>• <code>Claim.AccountId</code>• <code>Claim.OwnerId</code>• <code>CustomerProperty.OwnerId</code>• <code>CustomerProperty.PrimaryOwnerId</code>• <code>InsurancePolicy.NameInsuredId</code>• <code>InsurancePolicy.OwnerId</code>• <code>PersonLifeEvent.OwnerId</code>
<code>entityType</code>	string	<p>The type of data shared by this rule. This field shows these additional values for Insurance for Financial Services Cloud.</p> <ul style="list-style-type: none">• <code>BusinessMilestone</code>• <code>Claim</code>• <code>CustomerProperty</code>• <code>InsurancePolicy</code>• <code>PersonLifeEvent</code>

SEE ALSO:

[Metadata API Developer Guide: AccountRelationshipShareRule](#)

AssessmentQuestion

Represents the container object that stores the questions required for an assessment.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestion components have the suffix `.AssessmentQuestion` and are stored in the `AssessmentQuestions` folder.

Version

AssessmentQuestion components are available in API version 55.0 and later.

Fields

Field Name	Description
assessmentQuestionVersion	<p>Field Type AssessmentQuestionVersion</p> <p>Description The object that stores the question versions for the assessment questions.</p>
dataType	<p>Field Type string</p> <p>Description Required. The data type of the assessment question.</p>
developerName	<p>Field Type string</p> <p>Description Required. The developer name of the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>
displayTextCategory	<p>Field Type string</p>

Field Name	Description
	Description
	Specifies the category of the display text when the data type is Text Block.
formulaResponseDataType	Field Type string
	Description
	Specifies the data type of the question response calculated by a formula.
name	Field Type string
	Description
	Required.
	The name of the record.
questionCategory	Field Type string
	Description
	Required.
	Stores the question category.
relatedQuestion	Field Type string
	Description
	Specifies the related question. Used to define a question hierarchy.

AssessmentQuestionVersion

Stores the question versions for the assessment questions.

Field Name	Description
additionalInformation	Field Type string
	Description
	The additional details for a UI element, such as the disclosure text.
description	Field Type string
	Description
	The description for the assessment question. This text isn't rendered on the assessment.

Field Name	Description
guidanceInformation	Field Type string
	Description The guidance for the assessment question.
helpText	Field Type string
	Description The text that's added as an info bubble in the UI element related to the assessment question.
isActive	Field Type boolean
	Description Required. Indicates whether the current version of the assessment question is set to active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
name	Field Type string
	Description Required. Name of the assessment question version record.
optionSourceResponseValue	Field Type boolean
	Description Indicates whether the response value source for an assessment question is configured as custom (<code>true</code>) or sObject in the OmniStudio designer (<code>false</code>). The default value is <code>false</code> .
questionText	Field Type string
	Description Required. The assessment question text. Contains the label for the assessment question that appears on the assessment.
responseValues	Field Type string

Field Name	Description
Description	
	Holds the values to be defined in the picklist, multiselect picklist, or radio buttons.
status	Field Type string
Description	
	Required.
	Status of the assessment question version. Possible values are Draft, Active, or Archived.
versionNumber	Field Type int
Description	
	Required.
	The assessment question version number.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestion component.

```

<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestion
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <assessmentQuestionVersion>
    <additionalInformation>ParentQuestionDevName AI</additionalInformation>
    <description>ParentQuestionDevName Desc</description>
    <helpText>ParentQuestionDevName HT</helpText>
    <isActive>true</isActive>
    <name>ParentQuestionDevName</name>
    <optionSourceResponseValue>true</optionSourceResponseValue>
    <questionText>ParentQuestionDevName Text</questionText>
    <status>Active</status>
    <versionNumber>1</versionNumber>
  </assessmentQuestionVersion>
  <dataType>DateTime</dataType>
  <developerName>ParentQuestionDevName</developerName>
  <name>ParentQuestionDevName</name>
  <questionCategory>Demographic</questionCategory>
</AssessmentQuestion>

```

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

```

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

```

```
<members>*</members>
<name>AssessmentQuestion</name>
</types>
<version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment questions, we recommend that you review these considerations.

- When you retrieve an assessment question, you also get the related assessment question version with the status Active..



Note: If an active assessment question version doesn't exist for the assessment question, then the latest assessment question version with Status as Draft is retrieved.

- The value for the `<status>` tag in the XML definition must match the status of the related assessment question version.
- If an assessment question has a related assessment question (parent question), the XML definition must include the developer name of the related assessment question.
- If the fields of an assessment question contain values, the XML definition must contain tags with those values when retrieving it.

Before you deploy assessment questions, we recommend that you review these considerations.

- If the Related Question isn't available in the target org, deploying the assessment question fails.
- If an assessment question with the same developer name exists in the target org, deploying the assessment question updates the values of the other fields in the target org.
- If the `<versionNumber>` tag is present in the XML definition of an assessment question, deploying creates a version for that question in the target org.
- If the Related Questions aren't available in target org but available in the package, then deploying the questions inserts the Related Questions in the correct order.
- If the assessment questions are associated with flows of type Discovery Framework Data Capture Flow, then deploy the assessment questions first. After deploying the assessment questions, deploy the flows.

AssessmentQuestionSet

Represents the container object for Assessment Questions.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestionSet components have the suffix `.AssessmentQuestionSet` and are stored in the `AssessmentQuestionSets` folder.

Version

AssessmentQuestionSet components are available in API version 55.0 and later.

Fields

Field Name	Description
assessmentQuestionDeveloperNames	<p>Field Type <code>string[]</code></p> <p>Description The developer names for the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>
developerName	<p>Field Type <code>string</code></p> <p>Description Required. The developer name for the assessment question set. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>
name	<p>Field Type <code>string</code></p> <p>Description Required. The question set name.</p>

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestionSet component.

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

```
<name>QuestionSetName</name>
<assessmentQuestionDeveloperNames>QuestionDevName</assessmentQuestionDeveloperNames>
</AssessmentQuestionSet>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>AssessmentQuestion</name>
  </types>
  <types>
    <members>*</members>
    <name>AssessmentQuestionSet</name>
  </types>
  <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment question sets, we recommend that you review these considerations.

- When retrieving an assessment question set, if its fields contain values, then the XML definition must contain tags with those values.
- When retrieving an assessment question set, if that set is associated with multiple questions, then the XML definition must contain developer names of all the associated questions.

Before you deploy assessment question sets, we recommend that you review these considerations.

- When deploying an assessment question set, if an assessment question set with the same developer name doesn't exist in the target org, deploying creates one with that name.
- If an assessment question set with the same developer name exists in the target org, then deploying the question set updates the values of the other fields in the target org.
- If the questions associated with the assessment question set don't exist in the target org, deploying the assessment question set fails.
- If the questions associated with the assessment question set don't exist in the target org but are available in the package, then deploying the assessment question sets inserts the questions in the correct order.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services.

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

Parent Type

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

File Suffix and Directory Location

ClaimFinancialSettings components have the suffix `claimFinancialSettings` and are stored in the `ClaimFinancialSettings` folder.

Version

ClaimFinancialSettings components are available in API version 57.0 and later.

Special Access Rules

To access this metadata type, you require access to either `InsurancePolicyAdminAccess` or `InsuranceClaimMgmtAccess` add-on license.

Fields

Field Name	Description
<code>claimCovPendingAuthStatus</code>	Field Type string Description Required. The status of pending financial authority for claim coverage.
<code>claimPendingAuthorityStatus</code>	Field Type string Description Required. The status of pending financial authority for claim.
<code>clmCovPymtDtlPendAuthSts</code>	Field Type string Description Required. The status of pending financial authority for claim coverage payment detail.
<code>masterLabel</code>	Field Type string Description Required.

Field Name	Description
	The unique label that identifies the claim financial settings throughout the Salesforce user interface.

Declarative Metadata Sample Definition

The following is an example of a ClaimFinancialSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ClaimFinancialSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <claimCovPendingAuthStatus>Pending Authority</claimCovPendingAuthStatus>
  <claimPendingAuthorityStatus>Pending Authority</claimPendingAuthorityStatus>
  <clmCovPymtDtlPendAuthSts>Pending Authority</clmCovPymtDtlPendAuthSts>
  <masterLabel>Claim Financial Settings</masterLabel>
</ClaimFinancialSettings>
```

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

```
<?xml version="1.0" encoding="UTF-8"?><!--
~ Copyright 2022 salesforce.com, inc.
~ All Rights Reserved
~ Company Confidential
-->
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>ClaimFinancialSettings</name>
  </types>
  <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

DocumentChecklistSettings

Represents an org's DocumentChecklistItem settings. This type extends the Metadata metadata type and inherits its fullName field. In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for more details.

File Suffix and Directory Location

DocumentChecklistSettings components are stored in the DocumentChecklist.settings file in the settings folder. The .settings files are different from other named components because there's only one settings file for each settings component.

Version

DocumentChecklistSettings components are available in API versions 55.0 and later.

Fields

Field Name	Field Type	Description
dciCustomSharing	boolean	Indicates whether the custom sharing rule for document checklist items is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
deleteDCIWithFiles	boolean	Indicates whether deletion of document checklist items is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .

Declarative Metadata Sample Definition

The following is an example of a DocumentChecklistSettings.settings component.

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

Example Package Manifest

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>DocumentChecklist</members>
    <name>Settings</name>
  </types>
  <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

The wildcard character * (asterisk) in the package.xml manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see [Settings](#). For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

Flow for Financial Services Cloud

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

Flow

Financial Services Cloud exposes additional FlowProcessType values on the Flow type in Metadata API.

Field Name	Field Type	Description
processType	FlowProcessType (enumeration of type string)	<p>The type of the flow, as determined by the active version. Valid values added by Financial Services Cloud include:</p> <ul style="list-style-type: none"> • <code>FSCLending</code>—A flow for Financial Services Cloud Mortgage. This value is available in API version 46.0 and later.

FlowActionCall

Financial Services Cloud exposes additional actionType values for the FlowActionCall Metadata type.

Field Name	Field Type	Description
actionType	FlowActionType (enumeration of type string)	<p>Required. The action type. Additional valid values only for Financial Services Cloud include:</p> <ul style="list-style-type: none"> • <code>createCaseForFeeReversal</code>—Creates a case to request a fee reversal for a client. This value is available in API version 62.0 and later. • <code>createFinancialRecords</code>—Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application. This value is available in API version 49.0 and later. • <code>createIntegrationPlan</code>—Creates an integration plan record based on an object by using Expression Sets to make decisions and Dynamic Fulfillment Orchestration to create related object records. This value is available in API version 60.0 and later. • <code>runIntegrationPlan</code>—Triggers an integration plan using Dynamic Fulfillment Orchestration, which ensures each callout happens at the right time by queuing it alongside its dependent steps. This value is available in API version 60.0 and later.

SEE ALSO:

[Metadata API Developer Guide: Flow](#)

Icon

Represents the mapping of custom icons to objects. This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

Icon components have the suffix `.icon` and are stored in the `icons` folder.

Version

Icon components are available in API version 49.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Health Cloud or Financial Services Cloud license.

Fields

Field Name	Field Type	Description
<code>image</code>	string	Required. The image file that is mapped to the object. Use the ContentAsset metadata type to hold the icon image referenced in the <code>image</code> field.
<code>key</code>	string	Required. A field value in the object. For example, with the <code>PersonLifeEvent</code> object, possible values for <code>key</code> can be <code>birthday</code> , <code>marriage</code> , <code>childbirth</code> , and so on.
<code>usageType</code>	IconUsageType (enumeration of type string)	Required. The object that is mapped to the image. Valid values are: <ul style="list-style-type: none">• <code>PersonLifeEvent</code>• <code>InsurancePolicy</code>• <code>BusinessMilestone</code>• <code>AssetMilestone</code>• <code>FinancialAccountMilestone</code>

Declarative Metadata Sample Definition

The following is an example of an Icon component.

```
<?xml version="1.0" encoding="UTF-8"?>
<Icon xmlns="http://soap.sforce.com/2006/04/metadata">
  <usageType>PersonLifeEvent</usageType>
  <key>Birth</key>
  <image>image</image>
</Icon>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>icons</members>
    <name>Icon</name>
  </types>
  <version>49.0</version>
</Package>
```

IndustriesSettings

Represents settings for Financial Services Cloud. This type extends the Metadata metadata type and inherits its `fullName` field. In the package manifest, all organization settings metadata types are accessed using the `Settings` name. See `Settings` for details.

File Suffix and Directory Location

`IndustriesSettings` are stored in a single file named `Industries.settings` in the `settings` directory.

Version

`IndustriesSettings` are available in API version 47.0 and later.

Special Access Rules

Users need the Health Cloud permissions to access the settings available in editions with Health Cloud.

Fields for Financial Services Cloud

Field Name	Field Type	Description
<code>allowMultipleProducersToWorkOnSamePolicy</code>	boolean	Indicates whether multiple producers can be assigned to the same insurance policy. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>createCustomerPropertyFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create a customer property record from a loan application property record to represent the new home.
<code>createFinancialAccountFromLAAAsset</code>	boolean	When importing loan application data, indicates whether to create financial account records from the assets listed in the loan application.
<code>createFinancialAccountFromLALiability</code>	boolean	When importing loan application data, indicates whether to create financial account records from the liabilities listed in the loan application.

Field Name	Field Type	Description
createFinancialAccountsFromLAFinancials	boolean	When importing loan application data, indicates whether to create a financial account record that represents the mortgage loan.
createFinancialAccountsFromLAProperty	boolean	When importing loan application data, indicates whether to create a financial account record from the loan application property to represent the new home.
createFSCAssetFromLAAsset	boolean	When importing loan application data, indicates whether to create asset records from the assets listed in the loan application.
createFSCAssetFromLAProperty	boolean	When importing loan application data, indicates whether to create an asset record from a loan application property record to represent the new home that was acquired.
createFSCLiabilityFromLAFinancial	boolean	When importing loan application data, indicates whether to create a liability record from a loan application property record to represent the new mortgage loan.
createFSCLiabilityFromLALiability	boolean	When importing loan application data, indicates whether to create liability records from the liabilities listed in the loan application.
enableAccessToMasterListOfCoverageTypes	boolean	Indicates whether insurance agents can access the main list of coverage types. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableCallReportAdminContextPref	boolean	Indicates whether admins can configure the Account Interactions component and use a component attribute to control whether end users can view data on the component with admin privileges (<code>true</code>) or not (<code>false</code>). The default is <code>false</code> .
enableCalculationUsingParentPolicyOnly	boolean	Indicates whether the policy premiums are calculated by using only the parent policy's premium (<code>true</code>) or not (<code>false</code>). Use this for hierarchical policies where premiums are stored at different levels. The default value is <code>false</code> .
enableCompliantDataSharingForInteraction	boolean	Indicates whether compliant data sharing is enabled for the Interaction object (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableClaimMgmt	boolean	Indicates whether the recording and processing of the first loss notifications and managing claim participants, coverages, and settlements are enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableCompliantDataSharingForAccount	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Account object. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableCompliantDataSharingForCustomObjects	boolean	Indicates whether the Compliant Data Sharing feature is enabled for custom objects (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.

Field Name	Field Type	Description
enableCompliantDataSharingForOpportunity	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Opportunity object (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableCompliantDataSharingForInteractionSummary	boolean	Indicates whether Compliant Data Sharing is enabled for the Interaction Summary object (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableDealManagement	boolean	Indicates whether the Financial Deal Management feature is enabled. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableDiscoveryFrameworkMetadata	boolean	Indicates whether the Assessment Question and Assessment Question Set features of the Discovery Framework Metadata are enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableEinsteinDocReaderMappings	boolean	Indicates whether the Intelligent Form Reader Mappings feature is enabled. The default is <code>false</code> .
enableEnhancedQuestionCreation	boolean	Indicates whether the Enhanced Question Creation Experience feature of the Discovery Framework is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableFinancialAccountMgmt	boolean	Indicates whether the Financial Account Management Standard Objects setting is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableFinancialDealRoleHierarchy	boolean	Indicates whether data sharing for the financial deals is configured to follow the role-based hierarchy (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableFinancialDealCallReportCmpPref	boolean	Indicates whether admins can use junction objects between the Financial Deal object and the Interaction and Interaction Summary objects within the Interaction Summary/Sharing component (<code>true</code>) or not (<code>false</code>). This field is available in API version 54.0 and later.
enableFinancialDealCallReportPref	boolean	Indicates whether the junction object is enabled between the Financial Deal object and the Interaction and Interaction Summary objects (<code>true</code>) or not (<code>false</code>). This field is available in API version 54.0 and later.
enableFSCInsuranceReport	boolean	Indicates whether sales managers can access the dashboard and prebuilt reports. The default is <code>false</code> . This field is available in API version 48.0 and later in editions where Financial Services Cloud is enabled.
		 Note: This setting can be enabled only if the <code>allowMultipleProducersToWorkOnSamePolicy</code> setting is already set to <code>true</code> .

Field Name	Field Type	Description
enableIndustriesAssessment	boolean	Indicates whether the Industries Assessment feature of the Discovery Framework is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableIndustriesKYC	boolean	Indicates whether the Industries KYC (Know Your Customer) is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableInteractionRoleHierarchy	boolean	Indicates whether role hierarchy-based sharing is available for interactions to users in the organization (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableInteractionSummaryPref	boolean	Indicates whether the Interaction Summary setting is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableInteractionSummaryRoleHierarchy	boolean	Indicates whether the Role-Hierarchy-Based Sharing for Interaction Summaries is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableManyToManyRelationships	boolean	Indicates whether insurance can manage many-to-many relationships between claims and cases, claims and assets, and assets and policy participants. For example, if set to <code>true</code> , agents can handle multiple claims through one case or have multiple cases handling one claim. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableMortgageRlaTotalsOrgPref	boolean	Indicates whether the calculation of assets and liabilities for residential loan application records is enabled for your org (<code>true</code>) or not (<code>false</code>). The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enablePolicyAdministration	boolean	Indicates whether the data model related to policy administrator is enabled (<code>true</code>) or not (<code>false</code>). If this option is enabled, entities such as transactions and transaction details are available within the policy admin data model. The default value is <code>false</code> .
enableRBLUsingCalcService	boolean	Indicates whether Roll-by-Lookup (RBL) Using Calc Service is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableRecordRollup	boolean	Indicates whether Record Rollup Optimization is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableReferralScoring	boolean	Indicates whether Einstein Referral Scoring for Financial Services Cloud is enabled for your org (<code>true</code>) or not (<code>false</code>). The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
enableSlackForCib	boolean	Indicates whether the access to Financial Services Cloud capabilities on Slack is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .

Field Name	Field Type	Description
enableSyncInteractionsPref	boolean	Indicates whether the Sync Interactions with Einstein Activity Capture setting is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
enableTimelinePref	boolean	Indicates whether the Timeline features are enabled for your organization (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
loanApplicantAddressAutoCreation	boolean	Indicates whether automatic generation of loan applicant records for new residential loan applications that are associated with person accounts is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
loanApplicantAutoCreation	boolean	Indicates whether automatic generation of loan applicant address records for new residential loan applications that are associated with person accounts is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
rlaEditIfAccHasEdit	boolean	Indicates whether a user can edit a residential loan application only if they have edit access on the account (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
transformRBLtoDPE	boolean	Indicates whether you can convert RBL rules into Data Processing Engine definitions for faster calculations. The default is <code>false</code> .

Declarative Metadata Sample Definition

The following is an example of a `Industries.Settings` metadata file.

```

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

  <enableAccessToMasterListOfCoverageTypes>false</enableAccessToMasterListOfCoverageTypes>

  <enableBlockResourceAvailabilityOrgPref>true</enableBlockResourceAvailabilityOrgPref>

  <enableCompliantDataSharingForAccount>true</enableCompliantDataSharingForAccount>
  <enableEinsteinDocReader>true</enableEinsteinDocReader>
  <enableEventManagementOrgPref>true</enableEventManagementOrgPref>
  <enableFSCIInsuranceReport>false</enableFSCIInsuranceReport>
  <enableInteractionSummaryPref>true</enableInteractionSummaryPref>
  <enableInteractionSummaryRoleHierarchy>true</enableInteractionSummaryRoleHierarchy>
  <enableManyToManyRelationships>true</enableManyToManyRelationships>
  <enableMortgageRlaTotalsOrgPref>true</enableMortgageRlaTotalsOrgPref>
  <enableMultiResourceOrgPref>true</enableMultiResourceOrgPref>
  <enableOverbookingOrgPref>true</enableOverbookingOrgPref>
  <enableRBLUsingCalcService>true</enableRBLUsingCalcService>
  <enableRecordRollup>true</enableRecordRollup>

```

```

<enableReferralScoring>true</enableReferralScoring>
<loanApplicantAddressAutoCreation>true</loanApplicantAddressAutoCreation>
<loanApplicantAutoCreation>true</loanApplicantAutoCreation>
</IndustriesSettings>

```

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

```

<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>Industries</members>
    <name>Settings</name>
  </types>
  <version>47.0</version>
</Package>

```

OmniScript

Represents an OmniScript for the Discovery Framework, which guides users through sales, service, and other business processes. For Discovery Framework, the customization type is *discoveryframework*.

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

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

File Suffix and Directory Location

OmniScript components have the suffix `omniScript` and are stored in the `omniScripts` folder.

Version

OmniScript components are available in API version 56.0 and later.

Special Access Rules

To use this metadata type, you must have an OmniStudio license and the Discovery Framework feature enabled in your Salesforce org.

Fields

Field Name	Description
customHtmlTemplates	Field Type string

Description

The angular OmniScript template definitions.

Field Name	Description
customJavaScript	Field Type string
	Description The custom JavaScript used for an OmniScript.
designerCustomizationType	Field Type string
	Description The OmniStudio designer customization type.
elementTypeComponentMapping	Field Type string
	Description Overrides all elements of one type with a custom Lightning web component by mapping the element type to the Custom LWC.
isActive	Field Type boolean
	Description Indicates whether the OmniScript is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
isIntegrationProcedure	Field Type boolean
	Description Indicates whether OmniScript is an Integration Procedure (<code>true</code>) or OmniScript metadata (<code>false</code>). The default value is <code>false</code> .
isMetadataCacheDisabled	Field Type boolean
	Description Indicates whether metadata cache for the integration procedure is disabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
isOmniScriptEmbeddable	Field Type boolean
	Description Indicates whether the OmniScript can be embedded in other OmniScripts (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>
isTestProcedure	Field Type boolean

Field Name	Description
	<p>Description Indicates whether OmniScript is a test procedure setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code></p>
isWebCompEnabled	<p>Field Type boolean</p> <p>Description Indicates whether web component OmniScript (not Angular) is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code></p>
language	<p>Field Type string</p> <p>Description Required. The language of the OmniScript.</p>
lastPreviewPage	<p>Field Type string</p> <p>Description The last page previewed in the OmniScript designer.</p>
name	<p>Field Type string</p> <p>Description Required. The name of the OmniScript.</p>
namespace	<p>Field Type string</p> <p>Description The namespace associated with this OmniScript record.</p>
omniAssessmentTasks	<p>Field Type OmniAssessmentTask[]</p> <p>Description The <code>omniAssessmentTasks</code> associated with the OmniScript. Available in API version 63.0 and later. This field is available only if the Dynamic Assessment Access license is enabled.</p>
omniProcessElements	<p>Field Type OmniProcessElement[]</p>

Field Name	Description
	Description
	The OmniProcessElements associated with the OmniScript.
omniProcessKey	Field Type
	string
	Description
	The integration procedure Type_SubType value.
omniProcessType	Field Type
	OmniProcessType (enumeration of type string)
	Description
	Required. Integration Procedure or OmniScript.
	Possible value is:
	<ul style="list-style-type: none"> OmniScript
overrideKey	Field Type
	string
	Description
	Reserved for future use.
propertySetConfig	Field Type
	string
	Description
	The configuration information associated with the OmniScript.
questionDevName	Field Type
	string
	Description
	The developer name of the assessment question in the OmniScript.
	 Note: This field is relevant only for OmniScripts with designerCustomizationType as <i>discoveryframework</i> .
requiredPermission	Field Type
	string
	Description
	The required permissions to execute the integration procedure.
responseCacheType	Field Type
	string
	Description
	Response cache used for the integration procedure (session or Org).

Field Name	Description
subType	Field Type string
	Description
	Required.
	The OmniScript sub type value.
type	Field Type string
	Description
	Required.
	The OmniScript type value.
uniqueName	Field Type string
	Description
	Required.
	The unique name for the OmniScript as Type_SubType_Language_VersionNumber.
versionNumber	Field Type string
	Description
	Required.
	The OmniScript version number.
webComponentKey	Field Type string
	Description
	Internal unique key for the generated Lightning Web Components (LWC).

OmniAssessmentTask

Represents the omni assessment tasks associated with the OmniScript.

Field Name	Description
name	Field Type string
	Description
	Required.
	The name of the omni assessment task.

Field Name	Description
status	<p>Field Type picklist</p> <p>Description The status of the omni assessment task. Possible values are:</p> <ul style="list-style-type: none"> • Completed • InProgress—In Progress • IsDefined—Is Defined • NotStarted—Not Started <p>The default value is IsDefined.</p>
uniqueName	<p>Field Type string</p> <p>Description A unique name for the omni assessment task.</p>

OmniProcessElement

Represents the OmniScript element associated with the OmniScript.

Field Name	Description
childElements	<p>Field Type OmniProcessElement[]</p> <p>Description The child elements associated with the OmniProcessElement.</p>
description	<p>Field Type string</p> <p>Description The description of the OmniProcessElement.</p>
designerCustomizationType	<p>Field Type string</p> <p>Description The OmniStudio designer customization type.</p>
	<p> Note: To create assessment questions using the Discovery Framework feature, use the customization type as <i>discoveryframework</i>.</p>
discoveryFrameworkUsageType	<p>Field Type string</p>

Field Name	Description
	Description The usage type for industries that use the Discovery Framework. For example, the value for Health Cloud is <code>HcUsageType</code> . The value for no specific industry is <code>Default</code> .
embeddedOmniScriptKey	Field Type string Description The ID of the embedded OmniScript
isActive	Field Type boolean Description Indicates whether the status of the OmniProcessElement is active (<code>true</code>) or not (<code>false</code>).
isOmniScriptEmbeddable	Field Type boolean Description Indicates whether the OmniScript with the OmniProcessElement can be embedded in other OmniScripts (<code>true</code>) or not (<code>false</code>).
level	Field Type double Description The vertical level in which the OmniProcessElement occurs on the OmniScript.
name	Field Type string Description Required. The name of the OmniProcessElement.
omniProcessVersionNumber	Field Type double Description The related OmniProcess version.
parentElementName	Field Type string Description The name of the parent OmniProcessElement.

Field Name	Description
parentElementType	Field Type string
	Description The type of the parent OmniProcessElement.
propertySetConfig	Field Type textarea
	Description The property set of the OmniProcessElement.
QuestionDevName	Field Type string
	Description The developer name of the assessment question in the OmniScript.
	 Note: This field is relevant only for OmniScripts with <code>designerCustomizationType</code> as <i>discoveryframework</i> .
sequenceNumber	Field Type double
	Description The horizontal level in which the OmniProcessElement occurs on the OmniScript.
type	Field Type string
	Description The OmniProcessElement type. For example, <code>Text</code> and <code>TextArea</code> .
uniqueIndex	Field Type string
	Description A unique index number for the OmniScript.

Declarative Metadata Sample Definition

The following is an example of a OmniScript component.

```

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

<elementTypeComponentMapping>{"ElementTypeToHTMLTemplateList": []}</elementTypeComponentMapping>

<isActive>false</isActive>

```



```
<subType>SBT5</subType>
<type>Type5</type>
<omniProcessKey>Type5_SBT5</omniProcessKey>
<uniqueName>Type5_SBT5_English_1</uniqueName>
<versionNumber>1.0</versionNumber>
<nameSpace></nameSpace>
<lastPreviewPage>LastPage</lastPreviewPage>
<customHtmlTemplates></customHtmlTemplates>
<customJavaScipt></customJavaScipt>
<description>TestOS</description>
<requiredPermission>OmniStudioAdmin</requiredPermission>
<responseCacheType>Org Cache</responseCacheType>
<designerCustomizationType></designerCustomizationType>
<webComponentKey>WebComponentKey</webComponentKey>
<overrideKey></overrideKey>
</OmniScript>
```

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

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

```
</types>
<version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage Type

Before you retrieve or deploy Discovery Framework OmniScripts, we recommend that you review these considerations.

- If the `DesignerCustomizationType` of the OmniScript is `discoveryframework`, then the questions in the OmniScript must be within the `<uniqueIndex>` tag in the metadata definition file.
- When deploying the OmniScript of type Discovery Framework, enable Discovery Framework Metadata Enabled setting.
- OmniScripts of type Discovery Framework don't support IDX Workbench.
- If any question associated with the OmniScript doesn't exist in the target org or, if the active version of that question doesn't exist in the target org, then deploying the OmniScript fails.

ParticipantRole

Represents details, such as the name and associated default access level, for a role that a participant can have in the context of a parent record.

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

Parent Type

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

File Suffix and Directory Location

`ParticipantRole` components have the suffix `.participantRole` and are stored in the `participantRoles` folder.

Version

`ParticipantRole` components are available in API version 50.0 and later.

Fields

Field Name	Description
<code>defaultAccessLevel</code>	
Field Type	
	picklist

Field Name	Description
	Description
	<p>Required. The default sharing access granted to the participant role.</p>
	<p>Valid values are:</p>
	<ul style="list-style-type: none"> • Edit—Read/Write • None • Read—Read Only
isActive	Field Type
	boolean
	Description
	<p>Indicates whether the participant role is activated.</p>
masterLabel	Field Type
	string
	Description
	<p>Required. The name for the participant role.</p>
parentObject	Field Type
	string
	Description
	<p>Required. The parent object for the participant role.</p>
	<p>Valid values are:</p>
	<ul style="list-style-type: none"> • Account • Budget
	<p>Available in API version 59.0 and later.</p>
	<ul style="list-style-type: none"> • IndividualApplication
	<p>Available in API version 59.0 and later.</p>
	<ul style="list-style-type: none"> • Interaction
	<p>Available in API version 52.0 and later.</p>
	<ul style="list-style-type: none"> • InteractionSummary
	<p>Available in API version 51.0 and later.</p>
	<ul style="list-style-type: none"> • FinancialDeal
	<p>Available in API version 52.0 and later.</p>
	<ul style="list-style-type: none"> • FundingAward
	<p>Available in API version 59.0 and later.</p>
	<ul style="list-style-type: none"> • FundingOpportunity
	<ul style="list-style-type: none"> • Opportunity

Field Name	Description
	<ul style="list-style-type: none"> Team <p>Available in API version 58.0 and later.</p> <ul style="list-style-type: none"> Custom objects

Declarative Metadata Sample Definition

The following is an example of a ParticipantRole component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ParticipantRole xmlns="http://soap.sforce.com/2006/04/metadata">
  <defaultAccessLevel>Read</defaultAccessLevel>
  <isActive>true</isActive>
  <masterLabel>Advisor</masterLabel>
  <parentObject>Account</parentObject>
</ParticipantRole>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>ParticipantRole</name>
  </types>
  <version>50.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RelatedRecordAssocCriteria

Represents criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them.

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

Parent Type

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

File Suffix and Directory Location

RelatedRecordAssocCriteria components have the suffix `.relatedRecordAssocCriteria` and are stored in the `relatedRecordAssocCriteria` folder.

Version

RelatedRecordAssocCriteria components are available in API version 52.0 and later.

Special Access Rules

To use this object, you must have the Financial Services Cloud Extension permission set.

Fields

Field Name	Description
associationHandlerApexClass	<p>Field Type string</p> <p>Description The name of a custom Apex class that handles the creation of association records for specific association criteria. This class must:</p> <ul style="list-style-type: none"> • Apply to an object that the Record Association Builder doesn't directly support • Implement the <code>fscwmgen.BranchManagementAssociationHandler</code> interface • Return a list of Branch Unit Related Records • Populate at least the minimum required fields in each Branch Unit Related Record: <ul style="list-style-type: none"> – <code>BranchUnitId</code>: Represents the current branch unit of the user or contact – <code>BusinessUnitMemberId</code>: The Banker ID of the user or contact – <code>RelatedRecordId</code>: The ID of the custom object to be related <p>This field is a relationship field.</p>
associationType	<p>Field Type AssociationType (enumeration of type string)</p> <p>Description Required. The association type. Values are:</p> <ul style="list-style-type: none"> • <code>BranchManagement</code>
description	<p>Field Type string</p>

Field Name	Description
	Description
	A description of the association criteria.
eventType	Field Type AssociationEventType (enumeration of type string)
	Description
	Required.
	The type of reference object event that triggers creation of the association. Values are:
	<ul style="list-style-type: none"> • Create • Update
isProtected	Field Type boolean
	Description
	An auto-generated value that doesn't impact the behavior of the metadata type. The default value is <code>false</code> .
masterLabel	Field Type string
	Description
	Required.
	The master label of the association criteria. This internal label doesn't get translated.
preCondition	Field Type string
	Description
	Required.
	A formula that, when true, causes a new association to be created.
referenceObject	Field Type string
	Description
	Required.
	The reference object for the association criteria.
selectedOwnerField	Field Type string
	Description
	A field to use instead of the default Owner ID.

Field Name	Description
status	<p>Field Type AssociationStatusType (enumeration of type string)</p> <p>Description Required. The status of the association criteria. Values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive

Declarative Metadata Sample Definition

The following is an example of a RelatedRecordAssocCriteria component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RelatedRecordAssocCriteria xmlns="http://soap.sforce.com/2006/04/metadata">
  <associationType>BranchManagement</associationType>
  <eventType>Create</eventType>
  <masterLabel>RevenueThreeMillion</masterLabel>
  <preCondition>[Account].AnnualRevenue > 3000000</preCondition>
  <referenceObject>Account</referenceObject>
  <status>Active</status>
</RelatedRecordAssocCriteria>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>RelatedRecordAssocCriteria</name>
  </types>
  <version>52.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works.

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

Parent Type

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

File Suffix and Directory Location

RelationshipGraphDefinition components have the suffix `.relationshipGraphDefinition` and are stored in the `relationshipGraphDefinitions` folder.

Version

RelationshipGraphDefinition components are available in API version 55.0 and later.

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field Name	Description
isActive	<p>Field Type boolean</p> <p>Description Required. Indicates whether the relationship graph is available for use (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p> Note: This field is read-only in API version 55.0.</p>
isTemplate	<p>Field Type boolean</p> <p>Description Required. Indicates whether you can configure this relationship graph as a template (<code>true</code> or not <code>false</code>). The default value is <code>false</code>. In the UI, this field is <i>Set as Template</i>.</p>
masterLabel	<p>Field Type string</p> <p>Description Required. A user-friendly name for RelationshipGraphDefinition, which is defined when the RelationshipGraphDefinition is created. In the UI, this field is <i>Label</i>.</p>

Field Name	Description
relationshipGraphDefVersions	<p>Field Type RelationshipGraphDefVersion[]</p> <p>Description Represents a list of graph versions associated with the relationship graph definition.</p>

RelationshipGraphDefVersion

The list of graph versions associated with the relationship graph definition.

Field Name	Description
graphDefinition	<p>Field Type string</p> <p>Description Required. Specifies a set of properties required to create a relationship graph, such as parent node, child relationships, filter and sort fields, and graph UI elements.</p>
graphType	<p>Field Type string</p> <p>Description Required. Specifies the type of graph. In API version 55.0, only <code>HorizontalHierarchy</code> graph type is supported.</p>

Declarative Metadata Sample Definition

The following is an example of a RelationshipGraphDefinition component.

```

<?xml version="1.0" encoding="UTF-8"?>
<RelationshipGraphDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <isActive>false</isActive>
    <isTemplate>true</isTemplate>
    <masterLabel>Account Graph</masterLabel>
    <relationshipGraphDefVersions>
        <graphDefinition>{
            "graph" : {
                "rootNode" : {
                    "object" : {
                        "entity" : "Account"
                    },
                    "configurationType" : "Primary",
                    "sortFields" : [ {

```

```
  "field" : {
    "field" : "LastModifiedDate",
    "whichEntity" : "TARGET"
  },
  "order" : "DESC"
} ],
"nodeUiConfig" : {
  "fieldsToDisplay" : [ ],
  "showFieldLabels" : true,
  "actions" : { }
},
"childRelationships" : [ {
  "OneToMany" : {
    "targetObjectNode" : {
      "object" : {
        "entity" : "Contact"
      },
      "configurationType" :"Custom",
      "sortFields" : [ {
        "field" : {
          "field" : "LastModifiedDate",
          "whichEntity" : "TARGET"
        },
        "order" : "DESC"
      } ],
      "nodeUiConfig" : {
        "fieldsToDisplay" : [ {
          "field" : "Name",
          "whichEntity" : "TARGET"
        }, {
          "field" : "Phone",
          "whichEntity" :"TARGET"
        } ],
        "showFieldLabels" : true,
        "actions" : {
          "containerActions" : [ {
            "action" : "New"
          } ],
          "recordActions" : [ {
            "action" : "Edit"
          }, {
            "action" : "Delete"
          } ]
        }
      },
      "childRelationships" : [ ]
    },
    "relationshipUiConfig" : { },
    "filter" : {
      "filterCriteria" : [ {
        "field" : {
          "field" : "Name",
          "whichEntity" : "TARGET"
        },
        "operator" : "EQUALS"
      } ]
    }
  }
} ]
```

```

        "operator" : "eq",
        "value" : "Salesforce"
    } ],
    "booleanFilter" : "1"
},
"targetObjectField" : {
    "field" : "AccountId",
    "whichEntity" : "TARGET"
}
}
}
},
"globalUiConfig" : {
    "borderColor" : "Green2",
    "borderThickness" : "2px",
    "colorShading" : "Black",
    "fieldLayout" : "Vertically Stacked",
    "recordContainerExpansion" : true,
    "recordExpansion" : true
}
}
}

```

</graphDefinition>

<graphType>HorizontalHierarchy</graphType>

</relationshipGraphDefVersions>

</RelationshipGraphDefinition>

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

```

<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <fullName>Package1</fullName>
    <types>
        <members>*</members>
        <name>RelationshipGraphDefinition</name>
    </types>
    <version>55.0</version>
</Package>

```

Wildcard Support in the Manifest File

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

StageDefinition

Represents a collection of fields to set up the states and transitions.

Parent Type

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

File Suffix and Directory Location

StageDefinition components have the suffix `.stageDefinition` and are stored in the `stageDefinitions` folder.

Version

StageDefinition components are available in API version 62.0 and later.

Fields

Field Name	Description
active	<p>Field Type boolean</p> <p>Description Required. Indicates whether the stage definition is active (<code>true</code>) or not (<code>false</code>).</p>
description	<p>Field Type string</p> <p>Description The description of the stage definition.</p>
masterLabel	<p>Field Type string</p> <p>Description Required. A user-friendly name for stage definition, which is defined when the metadata component is created.</p>
referenceObject	<p>Field Type string</p> <p>Description Required. The reference object associated with the stage definition.</p>
referenceObjectField	<p>Field Type string</p> <p>Description Required. The name of the field in the reference object used to define stages.</p>
referenceObjectRecordType	<p>Field Type string</p> <p>Description The record type of a reference object associated with the stage definition.</p>

Field Name	Description
stageTransition	<p>Field Type StageTransition[]</p> <p>Description A collection of fields to set up transitions between two states.</p>
stageValue	<p>Field Type StageValue[]</p> <p>Description A collection of fields to set up the field values of an object for which stages are defined.</p>

StageTransition

Represents a collection of fields to set up transitions between two states.

Field Name	Description
criteria	<p>Field Type StageCriteria[]</p> <p>Description A collection of fields to set up the criteria for the object stage transition and object stage change.</p>
customPermission	<p>Field Type string</p> <p>Description The custom permission associated with the stage transition. The custom permission required to initiate a stage change.</p>
fromStageValue	<p>Field Type string</p> <p>Description Required. The From Stage that's associated with the referenced object's stage transition.</p>
stepGroup	<p>Field Type StgFulfillmentStepDefGrp[]</p> <p>Description A collection of fields to set up the stage fulfillment step definition.</p>
toStageValue	<p>Field Type string</p>

Field Name	Description
	Description
	<p>Required. The <code>To Stage</code> that's associated with the referenced object's stage transition.</p>
userPermission	Field Type
	<p><code>StageUserPermission</code> (enumeration of type string)</p>
	Description
	<p>Specifies the type of user permission needed to initiate a stage change.</p>
	<p>Values are:</p>
	<ul style="list-style-type: none"> • <code>CoordinateClinicalTrials</code> • <code>CoordinateClnclTrialExprcUsr</code> • <code>ManageClinicalTrials</code> • <code>ParticipateClinicalTrials</code> • <code>ProcessOrder</code>

StageCriteria

Represents a collection of fields to set up the criteria for the object stage transition and object stage change.

Field Name	Description
condition	Field Type StageCondition
	Description
	<p>A collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values.</p>
criteriaType	Field Type <p><code>StageCriteriaType</code> (enumeration of type string)</p>
	Description
	<p>Required. Specifies the criteria type used to execute the transition.</p>
	<p>Values are:</p>
	<ul style="list-style-type: none"> • <code>AND</code> • <code>CUSTOMLOGIC</code> • <code>OR</code>
executionType	Field Type <p><code>StageCriteriaExecType</code> (enumeration of type string)</p>
	Description
	<p>Required. Specifies the type of logic used to execute the criteria.</p>

Field Name	Description
	Values are:
	<ul style="list-style-type: none"> CONDITION
logicalExpression	Field Type string
	Description
	Required. Formula to specify custom logic. Compares the Criteria Field to the Value Field.
targetObject	Field Type string
	Description
	Required. The object used in a Parent-Child object relationship condition.

StageCondition

Represents a collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values.

Field Name	Description
operator	Field Type StageConditionOperator (enumeration of type string)
	Description
	Required. Specifies the operator used in the transition criteria.
	Values are:
	<ul style="list-style-type: none"> Contains DoesNotContain Equals GreaterOrEqual GreaterThan LessOrEqual LessThan NotEqualTo StartsWith
sequenceNumber	Field Type int
	Description
	Required. Specifies the order of the object state transition condition in a sequence.

Field Name	Description
sourceField	<p>Field Type string</p> <p>Description Required. The object field to define filter conditions.</p>
value	<p>Field Type string</p> <p>Description Required. Value of the field used in the transition criteria.</p>

StgFulfillmentStepDefGrp

Represents a collection of fields to set up the stage fulfillment step definition.

Field Name	Description
name	<p>Field Type string</p> <p>Description Required. The name of the stage fulfillment step definition group.</p>
step	<p>Field Type StgFulfillmentStepDef[]</p> <p>Description A collection of fields to set up fulfillment step definitions for stages and transitions.</p>

StgFulfillmentStepDef

Represents a collection of fields to set up fulfillment step definitions for stages and transitions.

Field Name	Description
apiName	<p>Field Type string</p> <p>Description Required. The developer name of the stage fulfillment step definition.</p>
assignedToQueue	<p>Field Type string</p>

Field Name	Description
	Description
	The queue associated with the stage fulfillment step definition.
assignedToUser	Field Type string
	Description
	The user associated with the stage fulfillment step definition.
dependency	Field Type StgFulfillmentStepDpndDef[]
	Description
	A collection of fields to set up the stage fulfillment step dependency between two steps.
flowDefinitionName	Field Type string
	Description
	The name of the flow added to the step definition.
integrationDefinitionName	Field Type string
	Description
	The ID associated with the integration provider definition.
name	Field Type string
	Description
	Required. The name of the stage fulfillment step definition.
omniscriptName	Field Type string
	Description
	The name of the Omniscrypt defined in step definition.
runAsUser	Field Type string
	Description
	The ID of the user associated with the step definition. The user required to execute the step definition.
stepType	Field Type string

Field Name	Description
Field Name	Description
	Required. Specifies the type of fulfillment step.

StgFulfillmentStepDpndDef

Represents a collection of fields to set up the stage fulfillment step dependency between two steps.

Field Name	Description	
Field Name	Field Type	Description
step	string	Required. The step definition for the fulfillment step.

StageValue

Represents a collection of fields to set up the field values of an object for which stages are defined.

Field Name	Description	
Field Name	Field Type	Description
criteria	StageCriteria[]	A collection of fields to set up the criteria for the object stage transition and object stage change.
stepGroup	StgFulfillmentStepDefGrp[]	A collection of fields to set up the stage fulfillment step definition.
value	string	Required. The value of the field used in the transition criteria.

Declarative Metadata Sample Definition

The following is an example of a StageDefinition component.

```

<?xml version="1.0" encoding="UTF-8"?>
<StageDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <active>false</active>
  <description>Application form Stage transitions</description>
  <masterLabel>basic</masterLabel>
  <referenceObject>ApplicationForm</referenceObject>
  <referenceObjectField>Stage</referenceObjectField>
  <stageTransition>
    <criteria>
      <condition>
        <operator>Equals</operator>
        <sequenceNumber>1</sequenceNumber>
        <sourceField>ApplicationForm.Name</sourceField>
        <value>test</value>
      </condition>
      <criteriaType>AND</criteriaType>
      <executionType>CONDITION</executionType>
      <logicalExpression>1</logicalExpression>
      <targetObject>ApplicationForm</targetObject>
    </criteria>
    <userPermission>ProcessOrder</userPermission>
    <fromStageValue>Initiated</fromStageValue>
    <toStageValue>On Hold</toStageValue>
    <stepGroup>
      <name>Initiated-On Hold</name>
      <step>
        <apiName>Autotask_step_defn</apiName>
        <flowDefinitionName>disputemanagement__InvokeAsyncAction</flowDefinitionName>

        <name>Autotask step defn</name>
        <runAsUser>testuser@salesforce.com</runAsUser>
        <stepType>AutoTask</stepType>
      </step>
      <step>
        <apiName>testScreenFlow</apiName>
        <assignedToUser>testuser@salesforce.com</assignedToUser>
        <flowDefinitionName>cms_orch__CMS_NotifyRequester</flowDefinitionName>
        <name>testScreenFlow</name>
        <stepType>ManualTask</stepType>
        <dependency>
          <step>Autotask_step_defn</step>
        </dependency>
      </step>
    </stepGroup>
  </stageTransition>
  <stageValue>
    <value>Initiated</value>
    <criteria>
      <condition>
        <operator>Equals</operator>
        <sequenceNumber>1</sequenceNumber>
      </condition>
    </criteria>
  </stageValue>
</StageDefinition>

```

```

        <sourceField>ApplicationForm.Name</sourceField>
        <value>test</value>
    </condition>
    <criteriaType>AND</criteriaType>
    <executionType>CONDITION</executionType>
    <logicalExpression>1</logicalExpression>
    <targetObject>ApplicationForm</targetObject>
</criteria>
<stepGroup>
    <name>Initiated</name>
    <step>
        <apiName>Autotask_step_defn</apiName>
        <flowDefinitionName>disputemanagement__InvokeAsyncAction</flowDefinitionName>

        <name>Autotask step defn</name>
        <runAsUser>testuser@salesforce.com</runAsUser>
        <stepType>AutoTask</stepType>
    </step>
    <step>
        <apiName>testScreenFlow</apiName>
        <assignedToUser>testuser@salesforce.com</assignedToUser>
        <flowDefinitionName>cms_orch__CMS_NotifyRequester</flowDefinitionName>
        <name>testScreenFlow</name>
        <stepType>ManualTask</stepType>
        <dependency>
            <step>Autotask_step_defn</step>
        </dependency>
    </step>
</stepGroup>
</stageValue>
<stageValue>
    <value>On Hold</value>
</stageValue>
</StageDefinition>

```

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>StageDefinition</name>
    </types>
    <version>62.0</version>
</Package>

```

Wildcard Support in the Manifest File

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

FINANCIAL SERVICES CLOUD STANDARD INVOCABLE ACTIONS

Create related records for a residential loan application, get an assessment response summary, or create and run integration plans. For more information on standard invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

Create Financial Records Actions

Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application.

This object is available in API version 49.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
recordId	Type ID Description ID of the residential loan application.

Outputs

Input	Details
status	Type string Description Whether the creation process succeeded, partially succeeded, or failed.

Input	Details
customerPropertiesIdList	<p>Type string</p> <p>Description List of IDs created for CustomerProperty records.</p>
assetsAndLiabilitiesIdList	<p>Type string</p> <p>Description List of IDs created for AssetsAndLiabilities records.</p>
financialAccountsIdList	<p>Type string</p> <p>Description List of IDs created for FinancialAccount records.</p>
personAccountsIdList	<p>Type string</p> <p>Description List of IDs created for PersonAccount records.</p>
errors	<p>Type string</p> <p>Description List of errors that occurred during the creation process.</p>

Example

JSON Request Body

```
{
  "recordId" : "0cdB0000000CbVGIA0"
}
```

JSON Response Body

```
{
  "customerPropertiesIdList" : [ "0b8B0000000GnjdIAC" ],
  "assetsAndLiabilitiesIdList" : [ "a03B000000735LrIAI", "a03B000000735LsIAI",
  "a03B000000735LtIAI" ],
  "personAccountsIdList" : [ "001B000001K8Zx5IAF" ],
  "errors" : [ ],
  "status" : "SUCCESS",
  "financialAccountsIdList" : [ "a0EB000000227WoMAI", "a0EB000000227WpMAI",
  "a0EB000000227WqMAI" ]
}
```

Create Integration Plan

Creates an integration plan record based on an object by using Expression Sets to make decisions and Dynamic Fulfillment Orchestration to create related object records.

This action is available in API version 60.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
contextDefinitionName	Type string Description Required Name of the Context Definition record to build the context data for. Available in API version 61.0 and later.
contextMappingName	Type string Description Required Name of the Context Mapping record used to build the context. Available in API version 61.0 and later.
isTaggedData	Type boolean Description Indicates if the key in the data is a tagged key (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . Available in API version 61.0 and later.
contextData	Type string

Input	Details
	<p>Description JSON data of the context data record. Available in API version 61.0 and later.</p>
expressionSetName	<p>Type string</p> <p>Description API name of the expression set that identifies eligible integrations and their dependencies.</p>
anchorRecordId	<p>Type ID</p> <p>Description ID of the record that supplies any expression set input parameters missing from contextId.</p>

Outputs

Input	Details
integrationPlanId	<p>Type ID</p> <p>Description ID of the integration plan, which includes each callout step and step dependency.</p>

Example

This example shows a sample input for the Create Integration Plan action.

```
{
  "inputs": [
    {
      "contextDefinitionName": "Home Loan Application Context",
      "contextMappingName": "Home Loan Application Context Mapping",
      "isTaggedData": false,
      "contextData": {"\"businessObjectType\": \"Application
Form\", \"id\": \"13XSM0000000TjZxxU\"}",
      "expressionSetName": "HomeLoanIntegrationsES",
      "anchorRecordId": "13XSM0000000TjZxxU"
    }
  ]
}
```

This example shows a sample output for the Create Integration Plan action.

```
{
  "actionName": "createIntegrationPlan",
  "errors": null,
```

```
" isSuccess": true,  
" outputValues": {  
  " integrationPlanId": "13VSB000000IsYD2A0"  
},  
" version": 1  
}
```

Get Assessment Response Summary

Get Assessment Response Summary makes it easy to use a flow to trigger server-side document generation using Document Generation.

In the Discovery Framework, the responses from an assessment are stored in the `AssessmentQuestionResponse` object and the form metadata stays in the OmniScript. You can use this invocable action to pass assessment summary data to downstream processes. This invocable action provides summary JSON code that can be consumed in Document Generation workflows to generate documents.

The Get Assessment Response Summary invocable action takes an assessment ID as input to get the OmniScript (OmniProcess) ID, which is used to retrieve the OmniScript. The assessment ID also retrieves the assessment response and merges the response with the OmniScript to create an assessment summary response in the summary JSON code.

This object is available in API version 56.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v56.0/actions/standard/getAssessmentResponseSummary`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
assessmentId	Type
	ID
	Description
	Required. The ID of the assessment record for which to summarize responses.

Outputs

Output	Details
assessmentResponseSummary	<p>Type string</p> <p>Description A JSON string containing the summary assessment question texts and responses for the specified assessment record. The response summary structure follows the structure of the OmniScript.</p>

Usage

Sample Input

When exposing the Get Assessment Response Summary invocable action in a REST API, you can use the following format to pass input, which includes the assessmentId and its value.

```
{
  "inputs" : [ {"assessmentId" : "0U3R00000005FN0AY"} ]
}
```

Sample Output

In this example, the first line indicates the OmniScript type, subtype, and language. For each step, there are multiple questions that appear in the OmniScript. You can use this information in a downstream process, such as PDF file rendering using Document Generation.

```
"KYC_Individual_English": {
  "Step1": {
    "label": "Identity Details",
    "value": {
      "LC_Survey_Question_2": {
        "label": "Full Name",
        "value": "Joe Smith"
      },
      "DateofBirth_m": {
        "label": "Date of Birth",
        "value": "Thu Jul 27 00:00:00 GMT 2000"
      },
      "Gender_m": {
        "label": "Gender",
        "value": "Female"
      },
      "EmailAddress_m": {
        "label": "Email Address",
        "value": "Joe.Smith@company.com"
      },
      "PAN": {
        "label": "PAN",
        "value": "QWEASDZXC"
      }
    }
}
```

```
        },
        "Step2": {
            "label": "Address Details",
            "value": {
                "Address_CorrespondenceAdd_Corporate": {
                    "label": "Address of Correspondence",
                    "value": "100 Some St, San Francisco, CA 12345, United States"
                },
                "Address_ContactDetails_Corporate": {
                    "label": "Telephone/Mobile",
                    "value": "1616111233"
                },
                "Alternate_Contact": {
                    "label": "Alternate Mobile Number",
                    "value": "1911212123"
                }
            }
        },
        "Step3": {
            "label": "Account Declaration",
            "value": {
                "Account_declaration": {
                    "label": "I declare that I have following deposit accounts with your/other bank's branches :",
                    "value": [
                        {
                            "Bank": {
                                "label": "Bank",
                                "value": "Acme1"
                            },
                            "Branch": {
                                "label": "Branch",
                                "value": "Mission St"
                            },
                            "Type_of_Account": {
                                "label": "Type of Account",
                                "value": "Checking"
                            },
                            "Account_Number": {
                                "label": "Account Number",
                                "value": "12345678"
                            }
                        },
                        {
                            "Bank": {
                                "label": "Bank",
                                "value": "Acme2"
                            },
                            "Branch": {
                                "label": "Branch",
                                "value": "Mission St"
                            },
                            "Type_of_Account": {
                                "label": "Type of Account",
                                "value": "Savings"
                            }
                        }
                    ]
                }
            }
        }
    }
}
```

```
        "value": "Savings"
    },
    "Account_Number": {
        "label": "Account Number",
        "value": "1234567890"
    }
}
],
}
},
"Step4": {
    "label": "Declaration",
    "value": {
        "Declaration_m": {
            "label": "The customer declares and certifies that the information in this form is true and correct. Any pre-filled sections of this form must be reviewed prior to signing and submitting, to ensure the information accurately conveys the new account details.",
            "value": "true"
        }
    }
}
}
```

Run Integration Plan

Triggers an integration plan using Dynamic Fulfillment Orchestration, which ensures each callout happens at the right time by queuing it alongside its dependent steps.

This action is available in API version 60.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
contextId	<p>Type ID</p> <p>Description ID of the Context Service which references the record ID that supplies expression set input parameters. Recommended record objects are Applicant, ApplicationForm, and PartyProfile.</p>
integrationPlanId	<p>Type ID</p> <p>Description ID of the integration plan, which includes each callout step and step dependency.</p>

Outputs

Input	Details
status	<p>Type ID</p> <p>Description Status of the integration plan's progress. Valid values are Running, Not Started, Failed.</p>

Example

JSON Request Body

```
{
  "inputs": {
    "integrationPlanId" : "13VSB000000IsYD2A0"
  }
}
```

JSON Response Body

```
{
  "actionName": "runIntegrationPlan",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "status": "SUCCESS"
  },
  "version": 1
}
```

FINANCIAL SERVICES CLOUD TOOLING API OBJECTS

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[ClaimFinancialSettings](#)

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

[RelationshipGraphDefinition](#)

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.

[RevenueSourceCategoryConfig](#)

Represents the Revenue Data Source-related stage information and the revenue metric that you want to measure and track. This object is available in API version 57.0 and later.

[RevenueSourceObjectConfig](#)

Represents data from the underlying Salesforce standard or custom object that stores opportunity and product-related information. This object is available in API version 57.0 and later.

[Discovery Framework Tooling API Objects](#)

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[StageCondition](#)

Represents a collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values. This object is available in API version 62.0 and later.

[ClaimFinancialSettings](#)

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

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
ClaimCovPendingAuthStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim coverage.</p>
ClaimPendingAuthorityStatus	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim.</p>
ClmCovPymtDtlPendAuthSts	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of pending financial authority for claim coverage payment detail.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for the claim financial settings object.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the claim financial settings.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The unique label that identifies the claim financial settings throughout the Salesforce user interface.</p>
NamespacePrefix	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nullable</p> <p>Description The full name of the associated relationship graph in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the relationship graph is available for use (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p> Note: This field is read-only in API version 55.0.</p>

Field	Details
IsTemplate	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether you can configure this relationship graph as a template (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. In the UI, this field is Set as Template.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the relationship graph instance. Possible values are:</p> <ul style="list-style-type: none"> da—Danish de—German en_us—English es—Spanish es_mx—Spanish (Mexico) fi—Finnish fr—French it—Italian ja—Japanese ko—Korean nl_nl—Dutch no—Norwegian pt_BR—Portuguese (Brazil) ru—Russian sv—Swedish th—Thai zh_cn—Chinese (Simplified) zh_tw—Chinese (Traditional)
ManageableState	<p>Type ManageableState enumerated list</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> • beta • deleted • deprecated • deprecatedEditable • installed • installedEditable • released • unmanaged
MasterLabel	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Sort</p> <p>Description</p> <p>Required. Label for the relationship graph instance. In the UI, this field is Label.</p>
Metadata	<p>Type</p> <p>RelationshipGraphDefinition</p> <p>Properties</p> <p>Create, Nullable, Update</p> <p>Description</p> <p>The relationship graph's metadata.</p> <p>Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
NamespacePrefix	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nullable, Sort</p> <p>Description</p> <p>The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the

Field	Details
	<p>installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</p> <ul style="list-style-type: none"> In organizations that are 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.
RootObjectId	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the root object, which is the starting point or parent node in the relationship graph. For example, in a graph that displays how accounts, contacts, and financial goals are related, the account object is the root object, and its ID is the <code>RootObjectId</code>. This field is a relationship field.</p> <p> Note: Reserved for internal use.</p> <p>Relationship Name RootObject</p> <p>Relationship Type Lookup</p> <p>Refers To EntityDefinition</p>

RevenueSourceCategoryConfig

Represents the Revenue Data Source-related stage information and the revenue metric that you want to measure and track. This object is available in API version 57.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

RevenueIntelligenceFinsAddOn and FinancialServiceCloudStandardAddOn licenses are required to access this object in your org. To view, create, edit, and delete records, the user requires ManageFSCAnalytics and RevenueIntelligenceUser permission set.

Fields

Field	Details
ClosedDateFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the field from Revenue Data Source that stores the opportunity close date.</p>
ClosedLostStageOption	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The options that represent the Closed Lost stage.</p>
ClosedWonStageOption	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The options that represent the Closed Won stage.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
IsActive	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the category configurations are active (<code>true</code>) or not (<code>false</code>) The default value is <code>true</code> until the maximum active categories is reached. After that, the default value of this field is set to <code>False</code>.</p>
Language	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The language of the revenue source category object. Possible values are the supported languages in Financial Services Cloud.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Label for the revenue source category configuration. In the UI, this field is Revenue Source Category Configuration.</p>
RevenueDataSourceFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the field from Revenue Data Source that stores the revenue details as either amount or quantity.</p>
RevenueDataSourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The revenue data source record associated with this record. This field is a relationship field.</p> <p>Relationship Name RevenueDataSource</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To RevenueSourceObjectConfig</p>
StageFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the field from Revenue Data Source that stores the stage picklist values.</p>

RevenueSourceObjectConfig

Represents data from the underlying Salesforce standard or custom object that stores opportunity and product-related information. This object is available in API version 57.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

RevenueIntelligenceFinsAddOn and FinancialServiceCloudStandardAddOn licenses are required to access this object in your org. To view, create, edit, and delete records, the user requires ManageFSCAnalytics and RevenueIntelligenceUser permission set.

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
Description	
	<p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
Language	
	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the revenue source object configuration. Possible values are the supported languages in Financial Services Cloud.</p>
MasterLabel	
	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label for the revenue source object configuration. In the UI, this field is Revenue Source Object Configuration.</p>
PrimaryAccountFieldName	
	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the field that stores the reference to account information. If there are multiple accounts for Revenue Source Dataset, then this field would be the reference to the primary account.</p>
ProductNameField	
	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of field from Revenue Data Source or Revenue Product Dataset that stores the product name information.</p>

Field	Details
ProductReferenceFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the field from Revenue Data Source or Revenue Product Dataset that has a lookup to product information.</p>
ProductReferenceObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the standard or custom object that stores product information.</p>
RevDataSourceRefFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the field from Revenue Product Dataset that has a lookup to Revenue Data Source.</p>
RevenueDataSource	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The standard or custom object that stores opportunity information.</p>
RevenueProductDataset	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The standard or custom object that stores both opportunity and product information.</p>
UserIdentifierFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
Description	The name of the field that stores the user ID information of who owns the account.

Discovery Framework Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[AssessmentQuestionConfig](#)

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

[AssessmentQuestionSetConfig](#)

Represents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

AssessmentQuestionConfig

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET`, `HEAD`, `Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>

Field	Details
	<p>In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p>
	<p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.</p>
Language	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Language of the assessment question.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label of the assessment question.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

AssessmentQuestionSetConfig

Represents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET`, `HEAD`, `Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

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

Field	Details
	<p>Description Language of the assessment question set.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • beta—Managed-Beta • deleted—Managed-Proposed-Deleted • deprecated—Managed-Proposed-DDeprecated • deprecatedEditable—SecondGen-Installed-DDeprecated • installed—Managed-Installed • installedEditable—SecondGen-Installed-Editable • released—Managed-Released • unmanaged—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label of the assessment question set.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

StageCondition

Represents a collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values. This object is available in API version 62.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To access this object in your org, enable the Stage Management setting.

Fields

Field	Details
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Type ManageableState enumerated list</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> • beta • deleted • deprecated • deprecatedEditable • installed • installedEditable • released • unmanaged
Operator	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Operator for stage condition filter (enumeration of type string).</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> • Contains • DoesNotContain • Equals • GreaterOrEqual • GreaterThan • LessOrEqual • LessThan • NotEqualTo • StartsWith
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The order of the object state transition condition in a sequence.</p>
SourceField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The object field to define filter conditions.</p>
StageCriteriaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The stage criteria associated with the stage definition. This field is a relationship field.</p> <p>Relationship Name StageCriteria</p> <p>Relationship Type Master-detail</p> <p>Refers To StageCriteria (the master object)</p>

Field	Details
Value	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Value for the field criteria.</p>

FINANCIAL SERVICES CLOUD CUSTOM METADATA TYPES

Financial Services Cloud Custom Metadata Types

Use custom metadata types and fields that help deliver additional features for Financial Services Cloud.

Fields and custom metadata types in the package have the `FinServ` namespace prefix. For example, `FinServ__AccountRecordType__c` is a custom field on Individual Record Type Mapper. `FinServ__IndividualRecordTypeMapper__mdt` is a custom metadata type.

Not all fields are listed for some custom metadata types. To verify the complete list of fields for a custom metadata type, use a describe call from the API, inspect the WSDL, or use a schema viewer.

IndividualRecordTypeMapper

Maps a new custom Individual record type to the standard Individual record type from Financial Services Cloud.

 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
<code>AccountRecordTypeNamespace__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Account record type being mapped.</p>
<code>AccountRecordType__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of your new custom Individual record type being mapped to the Financial Services Cloud Individual record type.</p> <p> Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.</p>

Field	Details
ContactRecordTypeNamespace__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Contact record type being mapped.</p>
ContactRecordType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Contact record type being mapped to the Financial Services Cloud Individual record type.</p>
DetailPage__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Salesforce internal-use only.</p>
IndividualType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Type of Individual being mapped.</p>
LeadRecordTypeNamespace__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Lead namespace for your custom record type's org.</p>
LeadRecordType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description Lead Record Type to be used when converting Lead records. Leave this field blank to use any record type. All available record types are converted to an Individual record type unless there is another mapping specified.</p>

GroupRecordTypeMapper

Maps a new custom Group record type to the standard Group record type from Financial Services Cloud.

 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
<code>AccountRecordType__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of your new custom Group record type being mapped to the Financial Services Cloud Group record type.</p> <p> Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.</p>
<code>AccountRecordTypeNamespace__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Account record type being mapped.</p>

ReferralRecordTypeMapper

Maps a new custom record type on the Lead object, used to represent a new type of referral, to the standard Referral record type from Financial Services Cloud.

 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
<code>LeadRecordType__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of your new custom record type on the Lead object being mapped to the Financial Services Cloud Referral record type.</p> <p> Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.</p>
<code>LeadRecordTypeNameSpace__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Lead record type being mapped.</p>

FINANCIAL SERVICES CLOUD CUSTOM TRIGGERS AND VALIDATION RULES

Financial Services Cloud Custom Triggers

Custom triggers ensure that data flows correctly through the Financial Services Cloud custom objects and fields.

Custom triggers use the `FinServ` namespace prefix. For example, `FinServ__AccountTrigger`, which is a custom trigger on `Account` that performs tasks on `Account`, `Contact`, and the relationship object `AccountAccountRelation`.

Table 1: Financial Services Cloud Quick Reference for Triggers

Trigger Name	Host Object
<code>FinServ__AccountAccountRelationTrigger.trigger</code>	<code>AccountAccountRelation</code>
<code>FinServ__AccountContactRelationTrigger.trigger</code>	<code>AccountContactRelation</code>
<code>FinServ__AccountTrigger.trigger</code>	<code>Account</code>
<code>FinServ__AlertTrigger.trigger</code>	<code>Alert</code>
<code>FinServ__AssetsAndLiabilitiesTrigger.trigger</code>	<code>AssetsAndLiabilities</code>
<code>FinServ__ContactContactRelationTrigger.trigger</code>	<code>ContactContactRelation</code>
<code>FinServ__ContactTrigger.trigger</code>	<code>Contact</code>
<code>FinServ__EventTrigger.trigger</code>	<code>Event</code>
<code>FinServ__FinancialAccountRoleTrigger.trigger</code>	<code>FinancialAccountRole</code>
<code>FinServ__FinancialAccountTrigger.trigger</code>	<code>FinancialAccount</code>
<code>FinServ__FinancialGoalTrigger.trigger</code>	<code>FinancialGoal</code>
<code>FinServ__FinancialHoldingTrigger.trigger</code>	<code>FinancialHolding</code>
<code>FinServ__LeadTrigger.trigger</code>	<code>Lead</code>
<code>FinServ__OpportunityTrigger.trigger</code>	<code>Opportunity</code>
<code>FinServ__RBLFilterCriteriaTrigger.trigger</code>	<code>RBLFilterCriteria</code>
<code>FinServ__ReciprocalRoleTrigger.trigger</code>	<code>ReciprocalRole</code>
<code>FinServ__RevenueTrigger.trigger</code>	<code>Revenue</code>
<code>FinServ__RollupByLookupConfigTrigger.trigger</code>	<code>RollupByLookupConfig</code>
<code>FinServ__SecuritiesTrigger.trigger</code>	<code>Securities</code>
<code>FinServ__TaskTrigger.trigger</code>	<code>Task</code>
<code>FinServ__InsurancePolicyTrigger.trigger</code>	<code>InsurancePolicy</code>
<code>FinServ__ClaimTrigger.trigger</code>	<code>Claim</code>

Trigger Behavior

The package provides triggers on sObjects, Relation sObjects, and Rollup sObjects. Each object type's trigger checks for various conditions and then performs tasks based on what it finds. Each object has one trigger. The following list explains trigger behavior by object.

sObjects



Note: The Account triggers support orgs using either the individual or person account models. Where the person account model is in use, the steps involving the creation of a Contact aren't needed.

Account

Before insert: If the record type indicates that the account isn't a portion of an individual, `IndividualType` is set to blank.

After insert: If the user creates an account of record type Individual, create an individual contact linked to the account. Also assigns topics based on the value in the field after an account has been created.

The steps to create an individual contact and assign topics are:

- For each account created, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current date.

Before update: Validates that the update on the account:

- Hasn't changed the account's record type from individual to another record type, and hasn't changed from one individual record type to another.
- Hasn't changed the account's record type from another record type to an individual record type.

After update: Syncs the contact associated with the updated account to reflect the updated fields. The following fields are synced:

- `AccountName`
- `OwnerId`
- `IndividualType__c`
- `RecordTypeId`

Before delete: Helps perform cascade deletes. Gathers all the rollup objects related to the account to be deleted.

After delete: Rolls back the rollup objects related to the deleted account.

Contact

Before insert: Creates an individual (Account - Representing Party) when the individual contact is promoted as an individual as follows.

- For each account that is passed, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current datetime.

After insert: Validates that the referenced individual account does not have a contact associated with it. This check is bypassed during a lead conversion.

Before update: Validates that the update on the account record:

- Hasn't changed the record type of the account from individual to another record type.
- Hasn't changed the record type of the account from any other record type to an individual.

- Validates that the referenced individual account does not have a contact associated with it.

After update: Syncs the account associated with the updated contact to reflect the updated fields. The following fields are synced:

- AccountName
- OwnerId
- IndividualType__c
- RecordTypeId

Reciprocal Role

After insert: If the role has the flag to create a reciprocal role set, creates a Reciprocal Role sObject for the inverse role.

Before delete: Where there is an inverse Reciprocal Role sObject record, delete that record.

RollupByLookupConfig

Before insert: Validates each new RollupByLookupConfig object according to these rules:

- Can't insert a duplicate RollupByLookupConfig object. Duplicate records are those that share combination of `ToObject__c`, `ToField__c`, and `LookupField__c`.
- Can't exceed 40 active RollupByLookupConfig objects.
- The fields and lookups on the RollupByLookupConfig object must be valid.
- The Where Clause field must contain a correctly formatted SQL expression.

Before update: Performs the same actions as before insert.

Before delete: Validates that the RollupByLookupConfig object isn't active (active objects can't be deleted).

RBLFilterCriteria

Before insert: Validates each new RBLFilterCriteria object according to these rules:

- A RBLFilterCriteria object can't be inserted when its parent is active.
- The fields on the RBLFilterCriteria object must be valid.
- The Operator must be valid ('greater than', 'equals', 'greater than or equals to', 'contains', 'not equal to', 'less than', 'less than or equal to', 'not contains', 'not like', 'starts with', 'ends with', 'in').

Before update: Performs the same actions as before insert.

Before delete: Validates that the RBLFilterCriteria object's parent RollupByLookupConfig object isn't active (RBLFilterCriteria objects with an active parent RollupByLookupConfig object can't be deleted).



Note: Alerts and Securities sObjects don't have triggers.

Relation sObjects



Note: Rollup calculation triggers are fired when Enable Rollup Summary is enabled in the Wealth Application Config custom setting. For more details, see [Temporarily Disable Rollups to Accelerate Data Loads](#).

AccountContactRelation (ACR)

Before insert: Populates `RecordTypeId` and `Date` for each ACR record to be inserted. Ensures that each ACR obeys these requirements:

- No multiple primary members for a given household.
- Contact portion can't be a member of multiple households.
- No multiple ACR records with the same `AccountId` and `ContactId` combination.

After insert: Recalculates the rollups for all groups in which member or business ACRs have changed.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as after insert.

Before delete: Ensures that none of the ACRs to be deleted are of the record type Group. Also recalculates rollups for all groups when any member or business ACRs have changed.

AccountAccountRelation (AAR)

After insert: If the auto-create inverse setting is selected, create the inverse record.

Before update: Checks to see if records are being deactivated. If so, sets `EndDate__c` as the day of the update, and if the auto-create inverse setting is selected deactivates the inverse record.

Before delete: If the auto-create inverse setting is selected, delete the inverse record of the AAR.

ContactContactRelation (CCR)

After insert: If the auto-create inverse setting is selected, creates the inverse record.

Before update: If records are being deactivated, sets `EndDate__c` as today, and if the auto-create inverse setting is selected deactivates the inverse record.

Before delete: If the auto-create inverse setting is selected, deletes the inverse record of the CCR.

Rollup sObjects



Note: Rollup sObject triggers provide for updating `Household__c`, which points to the account portion of the group that they roll up to. Usually, the rollup calculation is also calculated.

Household triggers are fired when Enable Group Record Rollups is enabled in the Wealth Application Config custom setting. After the triggers are fired, any active rollup calculations are performed when Enable Rollup Summary is enabled in the Wealth Application Config. For more details, see [Temporarily Disable Rollups to Accelerate Data Loads](#).

Financial Account

Before insert: Sets the value of the owner type when a FinancialAccount record is updated. Then sets `Household__c` to the account portion of the group that it's rolling up to.

After insert:

- Creates a primary owner financial account role for the new financial account.
- If defined, creates joint owner roles and user-selected roles.
- Performs the rollup calculation.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as after insert.

Before delete: Deactivates all Financial Account Roles related to the Financial Account by performing an UPDATE to set Active value to False.

After delete: Performs the rollup calculation.

Financial Account Role (FAR)

Before insert: If `RelatedContact__c` of the FAR record is associated with an individual account, updates `RelatedAccount__c` to that of the individual account.

After insert: For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record, then performs the rollup calculations.

Before update: Performs the same actions as before insert and, if the user has chosen to deactivate the FAR records, sets the end day to the current day.

After update: Performs the rollup calculations.

Before delete: Blocks the deletion of any FAR records of type Primary Owner. FAR records of type Primary Owner must be deleted from the associated Financial Account record. For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record.

After delete: Performs the rollup calculations.

Assets and Liabilities

Before insert: Sets `Household__c` to the account portion of the group that it's rolling up to.

Before update: Performs the same action as before insert.

Financial Goals

Before insert: Sets `Household__c` of the FinancialGoal record to the account portion of the group that the financial goal is rolling up to.

Before update: Performs the same action as before insert.

Financial Holdings

Before insert: Retrieves financial account fields based on the FinancialHolding record and then populates `Household__c` and `PrimaryOwner` on the financial holding to be inserted.

 **Note:** Financial holdings aren't part of the rollup objects, so no rollup is performed.

Revenue

After insert: Performs the rollup calculations.

After update: Performs the rollup calculations.

After delete: Performs the rollup calculations.

Tasks

Before insert: Sets `Household__c` of the Task record to the account portion of the group that the task is rolling up to.

After insert: Updates the Next and Last interaction for the Contact that is associated with the task.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Events

Before insert: Sets `Household__c` of the Event record to the account portion of the group that the event is rolling up to.

After insert: Updates the Next and Last interaction for the Contact that is related to the event.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Leads

Before insert: For individual data models only, this trigger maps the lead name to the company name field and updates the company name to the employer field for leads converted into individuals. It also checks and performs household rollup for referrals and stamps the `ReferredByContact__c` on the Lead object.

After insert: Updates the Next and Last interaction for the Contact that is related to the event.

Before update: For the individual data model, this trigger maps the lead name to the company name field and updates the employer field for leads converted into individuals. It validates data to ensure that Referral-mapped type Lead records are not associated with non-individuals and restricts mixed Account and Contact individual and non-individual record types. It also prevents any lead with

expressed interest from being converted to a new individual. Additionally, it checks and performs household rollup for referrals and stamps the `ReferredByContact__c` field on the Lead object.

After update: Ensures that the lead-converted contact is set as the primary contact on the account and that the opportunity linked to the lead is updated with the appropriate record type. After the lead is converted, it updates the converted accounts with the referred-by values from the lead. Additionally, it calculates and updates referral scores for the contact.

Opportunities

Before insert: Sets `Household__c` of the Opportunity record to the account portion of the group that the opportunity is rolling up to.

Before update: Performs the same action as before insert.

Insurance Policy

Before insert: Sets `Household__c` of the Insurance Policy record to the account portion of the household that the insurance policy is rolling up to.

Before update: Performs the same action as before insert.

Claim

Before insert: Sets `Household__c` of the Claim record to the account portion of the household that the claim is rolling up to.

Before update: Performs the same action as before insert.

Financial Services Cloud Custom Validation Rules

Custom validation rules ensure the integrity of your Financial Services Cloud data.

Custom validation rules use the `FinServ` namespace prefix. For example, `FinServ__NonPortalUserReferrer` is a custom validation rule on Account that validates that internal referrers are Salesforce users.

Table 2: Financial Services Cloud Quick Reference for Validation Rules

Validation Rule Name	Host Object	Default Status
NonPortalUserReferrer	Account	Active
NotAllowingConversionFromIndividual (retired)	Account	Inactive
NotAllowingConversionToIndividual (retired)	Account	Inactive
SingleReferredByEntryByRecord	Account	Active
AARCanOnlyBeDeactivated	AccountAccountRelation	Active
AccountAndRelatedAccountCannotBeSame	AccountAccountRelation	Active
AccountCannotBeAnIndividual	AccountAccountRelation	Active
CannotCreateInactiveRecord	AccountAccountRelation	Active
InactiveAARCannotBeEdited	AccountAccountRelation	Active
NoJointOwnerForIndividualAccounts	AssetsAndLiabilities	Active
PrimaryAndJointOwnerCannotBeSame	AssetsAndLiabilities	Active
BirthdateCannotBeInFuture	Contact	Active
CannotHaveMoreThanOnePrimaryAddress	Contact	Active

Validation Rule Name	Host Object	Default Status
ContactCannotBeAssociatedToHousehold	Contact	Active
IndividualCannotHaveMoreThanOneContact (retired)	Contact	Inactive
NonPortalUserReferrer	Contact	Active
NotAllowingConversionFromIndividual (retired)	Contact	Inactive
NotAllowingConversionToIndividual (retired)	Contact	Inactive
SingleReferredByEntryByRecord	Contact	Active
CannotCreateInactiveRecord	ContactContactRelation	Active
CCRCanOnlyBeDeactivated	ContactContactRelation	Active
ContactAndRelatedContactCannotBeSame	ContactContactRelation	Active
InactiveCCRCannotBeEdited	ContactContactRelation	Active
YearOfGradCannotBeInFuture	Education	Active
EndDateCannotBeInFuture	Employment	Active
StartDateCannotBeInFuture	Employment	Active
StartDateCannotBeLaterThanEndDate	Employment	Active
ManagedAndHeldAwayCannotBeBothSelected	FinancialAccount	Active
NoJointOwnerForIndividualAccounts	FinancialAccount	Active
PrimaryAndJointOwnerCannotBeSame	FinancialAccount	Active
CannotCreateInactiveRecord	FinancialAccountRole	Active
FARCannotBeModified	FinancialAccountRole	Active
InactiveFARCannotBeEdited	FinancialAccountRole	Active
InactiveRecordCannotBeReactivated (retired)	FinancialAccountRole	Active
OwnershipRolesCannotBeDeactivated	FinancialAccountRole	Active
OwnershipRolesCannotBeModified (retired)	FinancialAccountRole	Active
RelatedAccountOrContactRequired	FinancialAccountRole	Active
RoleIsMandatory	FinancialAccountRole	Active
ExpDateCannotBeLaterThanStart	IdentificationDocument	Active
IssueDateCannotBeInFuture	IdentificationDocument	Active
VerificationDateTimeCannotBeInFuture	IdentificationDocument	Active
NonPortalUserReferrer	Lead	Active
SingleReferredByEntryByRecord	Lead	Active

Validation Rule Name	Host Object	Default Status
NonPortalUserReferrer	Opportunity	Active
SingleReferredByEntryByRecord	Opportunity	Active
ProhibitUpdates	ReciprocalRole	Active
AccountOrFinancialAccountRequired	Revenue	Active

Table 3: Validation Rule Details

Object	Validation Rule Details
Account	<p>NonPortalUserReferrer: Validation fails if the value of the <code>UserType</code> field on the <code>ReferredByUser</code> is not <code>Standard</code>.</p> <p>NotAllowingConversionFromIndividual (retired): This validation rule has been retired.</p> <p>NotAllowingConversionToIndividual (retired): This validation rule has been retired.</p> <p>SingleReferredByEntryByRecord: Validation fails if both <code>ReferredByUser__c</code> and <code>ReferredByContact__c</code> are not blank.</p>
AccountAccountRelation	<p>AARCanOnlyBeDeactivated: Validation fails if <code>Account__c</code> or <code>RelatedAccount__c</code> is changed on an existing record.</p> <p>AccountAndRelatedAccountCannotBeSame: Validation fails if <code>Account__c</code> is the same as <code>RelatedAccount__c</code>.</p> <p>AccountCannotBeAnIndividual: Validation fails if the <code>IndividualType__c</code> field on the account or related account is set to <code>Individual</code>.</p> <p>CannotCreateInactiveRecord: Validation fails if a record is marked inactive when created.</p> <p>InactiveAARCannotBeEdited: Validation fails if a user tries to edit an existing record that's marked inactive.</p>
AssetsAndLiabilities	<p>NoJointOwnerForIndividualAccounts: Validation fails if the <code>JointOwner__c</code> field is not blank and <code>Ownership__c</code> field value is <code>Individual</code>.</p> <p>PrimaryAndJointOwnerCannotBeSame: Validation fails if the <code>PrimaryOwner__c</code> is the same as the <code>JointOwner__c</code>.</p>
Contact	BirthdateCannotBeInFuture: Validation fails if <code>birthdate__c</code> is in the future.

Object	Validation Rule Details
	<p>CannotHaveMoreThanOnePrimaryAddress: Validation fails if more than one address (mailing, billing, shipping, or other) is marked as primary.</p> <p>ContactCannotBeAssociatedToHousehold: Validation fails if account record type is <i>IndustriesHousehold</i>.</p> <p>IndividualCannotHaveMoreThanOneContact (retired): This validation rule has been retired.</p> <p>NonPortalUserReferrer: Validation fails if the value of the <code>UserType</code> field on the <code>ReferredByUser</code> is not <i>Standard</i>.</p> <p>NotAllowingConversionFromIndividual (retired): This validation rule has been retired.</p> <p>NotAllowingConversionToIndividual (retired): This validation rule has been retired.</p> <p>SingleReferredByEntryByRecord: Validation fails if both <code>ReferredByUser__c</code> and <code>ReferredByContact__c</code> are not blank.</p>
ContactContactRelation	<p>CannotCreateInactiveRecord: Validation fails if a record is marked inactive when created.</p> <p>CCRCanOnlyBeDeactivated: Validation fails if the contact, related contact, or role is changed on an existing record.</p> <p>ContactAndRelatedContactCannotBeSame: Validation fails if the contact is the same as the related contact.</p> <p>InactiveCCRCannotBeEdited: Validation fails if a user tries to edit an existing record that's marked inactive.</p>
Education	<p>YearOfGradCannotBeInFuture: Validation fails if the year of <code>GraduationDate__c</code> is after this year.</p>
Employment	<p>EndDateCannotBeInFuture: Validation fails if <code>EndDate__c</code> is after today.</p> <p>StartDateCannotBeInFuture: Validation fails if <code>StartDate__c</code> is after today.</p> <p>StartDateCannotBeLaterThanEndDate: Validation fails if <code>StartDate__c</code> is later than <code>EndDate__c</code>.</p>
FinancialAccount	<p>ManagedAndHeldAwayCannotBeBothSelected: Validation fails if both <code>Managed__c</code> and <code>HeldAway__c</code> are checked.</p> <p>NoJointOwnerForIndividualAccounts: Validation fails if <code>JointOwner__c</code> is not blank and <code>Ownership__c</code> is <i>Individual</i>.</p>

Object	Validation Rule Details
	PrimaryAndJointOwnerCannotBeSame: Validation fails if <code>PrimaryOwner__c</code> is the same as <code>JointOwner__c</code> .
FinancialAccountRole	<p>CannotCreateInactiveRecord: Validation fails if the <code>EndDate__c</code> is blank and the record is inactive.</p> <p>FARCannotBeModified: Validation fails if <code>RelatedAccount__c</code>, <code>RelatedContact__c</code>, <code>FinancialAccount__c</code>, or <code>Role__c</code> is changed on an existing record.</p> <p>InactiveFARCannotBeEdited: Validation fails when any edits are made to an existing inactive record.</p> <p>InactiveRecordCannotBeReactivated (retired): This validation rule has been retired.</p> <p>OwnershipRolesCannotBeDeactivated: Validation fails if an inactive record is updated to active.</p> <p>OwnershipRolesCannotBeModified (retired): This validation rule has been retired.</p> <p>RelatedAccountOrContactRequired: Validation fails if <code>RelatedAccount__c</code> and <code>RelatedContact__c</code> are both blank.</p> <p>RoleIsMandatory: Validation fails if <code>Role</code> is blank.</p>
IdentificationDocument	<p>ExpDateCannotBeLaterThanStart: Validation fails if <code>IssueDate__c</code> is after the <code>ExpirationDate__c</code>.</p> <p>IssueDateCannotBeInFuture: Validation fails if <code>IssueDate__c</code> is after today.</p> <p>VerificationDateTimeCannotBeInFuture: Validation fails if <code>VerificationOn__c</code> is in the future.</p>
Lead	<p>NonPortalUserReferrer: Validation fails if the value of the <code>UserType</code> field on the <code>ReferredByUser</code> is not <code>Standard</code>.</p> <p>SingleReferredByEntryByRecord: Validation fails if <code>ReferredByUser__c</code> and <code>ReferredByContact__c</code> are both blank or both not blank.</p>
Opportunity	<p>NonPortalUserReferrer: Validation fails if the value of the <code>UserType</code> field on the <code>ReferredByUser</code> is not <code>Standard</code>.</p> <p>SingleReferredByEntryByRecord: Validation fails if both <code>ReferredByUser__c</code> and <code>ReferredByContact__c</code> are not blank.</p>
ReciprocalRole	ProhibitUpdates: Validation fails if <code>CreateInverseRole__c</code> , <code>Name</code> , <code>InverseRole__c</code> , or <code>RecordTypeId</code> is changed.

Object	Validation Rule Details
Revenue	AccountOrFinancialAccountRequired: Validation fails if Account__c and FinancialAccount__c are both blank or both not blank.

DATA PROCESSING ENGINE AND MONITOR WORKFLOW SERVICES

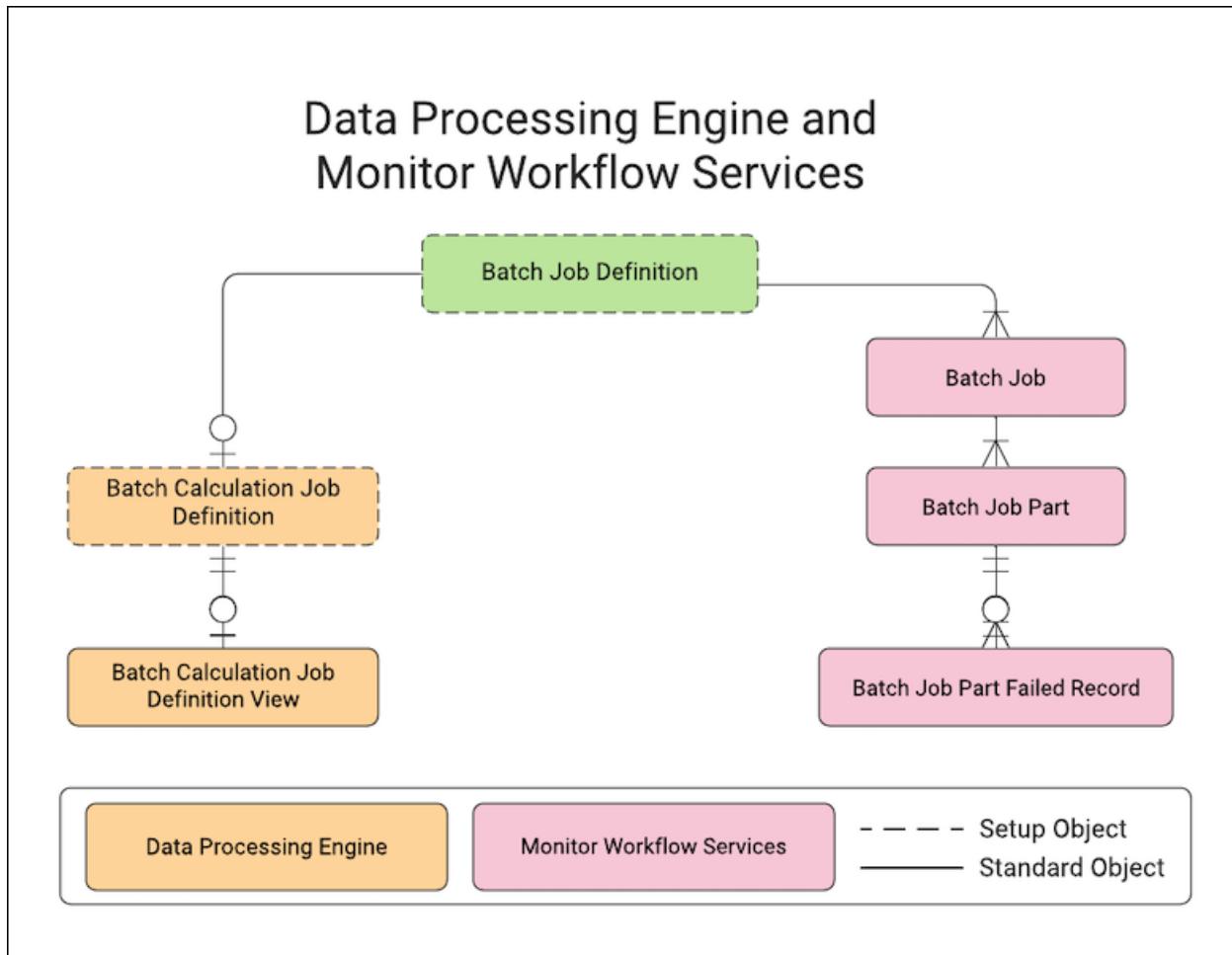
Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using Data Processing Engine definitions. After you activate a Data Processing Engine definition, you can run it. Each run can be tracked using Monitor Workflow Services.

Here's the data model for Data Processing Engine and Monitor Workflow Services:

EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, or Rebate Management. Data Processing Engine isn't available for Salesforce orgs in Government Cloud or Government Cloud Plus.



Here is the list of developer resources you can use for Data Processing Engine:

- Standard Objects
 - BatchCalcJobDefinitionView
- Setup Objects
 - BatchCalcJobDefinition
 - BatchJobDefinition

To know more about setup objects, see the [Tooling API Developer Guide](#).

- Invocable Actions
 - dataProcessingEngineAction
- Platform Event
 - BatchJobStatusChangedEvent

Here is the list of standard objects for Monitor Workflow Services:

- BatchJob
- BatchJobPart
- BatchJobPartFailedRecord

Data Processing Engine and Monitor Workflow Services

To know more about Data Processing Engine, see the [Data Processing Engine help](#).

API END-OF-LIFE POLICY

Salesforce is committed to supporting each API version for a minimum of three years from the date of first release. In order to mature and improve the quality and performance of the API, versions that are more than three years old sometimes are no longer supported. Salesforce notifies customers who use an API version scheduled for deprecation at least one year before support for the version ends.

Salesforce API Versions	Version Support Status	Version Retirement Info
Versions 31.0 through 64.0	Supported.	
Versions 21.0 through 30.0	As of Summer '22, these versions have been deprecated and no longer supported by Salesforce. Starting Summer '25, these versions will be retired and unavailable.	Salesforce Platform API Versions 21.0 through 30.0 Retirement
Versions 7.0 through 20.0	As of Summer '22, these versions are retired and unavailable.	Salesforce Platform API Versions 7.0 through 20.0 Retirement

If you request any resource or use an operation from a retired API version, REST API returns the 410 :GONE error code.

To identify requests made from old or unsupported API versions, use the free [API Total Usage](#) event type.