Nonprofit Cloud Developer Guide

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@salesforcedocs

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CHAPTER 1 Introduction to Nonprofit Cloud

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

EDITIONS

Available in: Lightning Experience

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

CHAPTER 2 Nonprofit Cloud Data Model

In this chapter ...

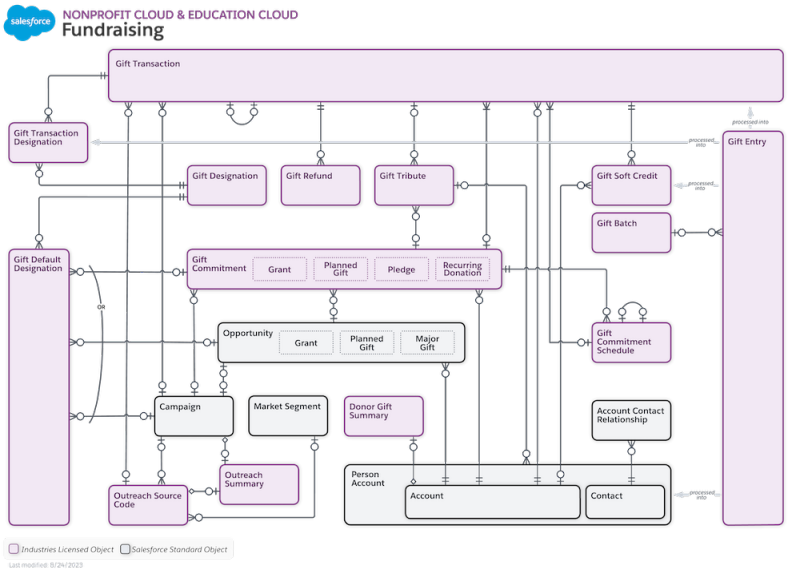
- Fundraising Data Model
- Program Management Data Model
- Case Management Data Model
- Outcome Management Data Model
- Grantmaking and Budget Management Data Model

Learn about the objects and relationships within Nonprofit Cloud

Fundraising Data Model

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

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

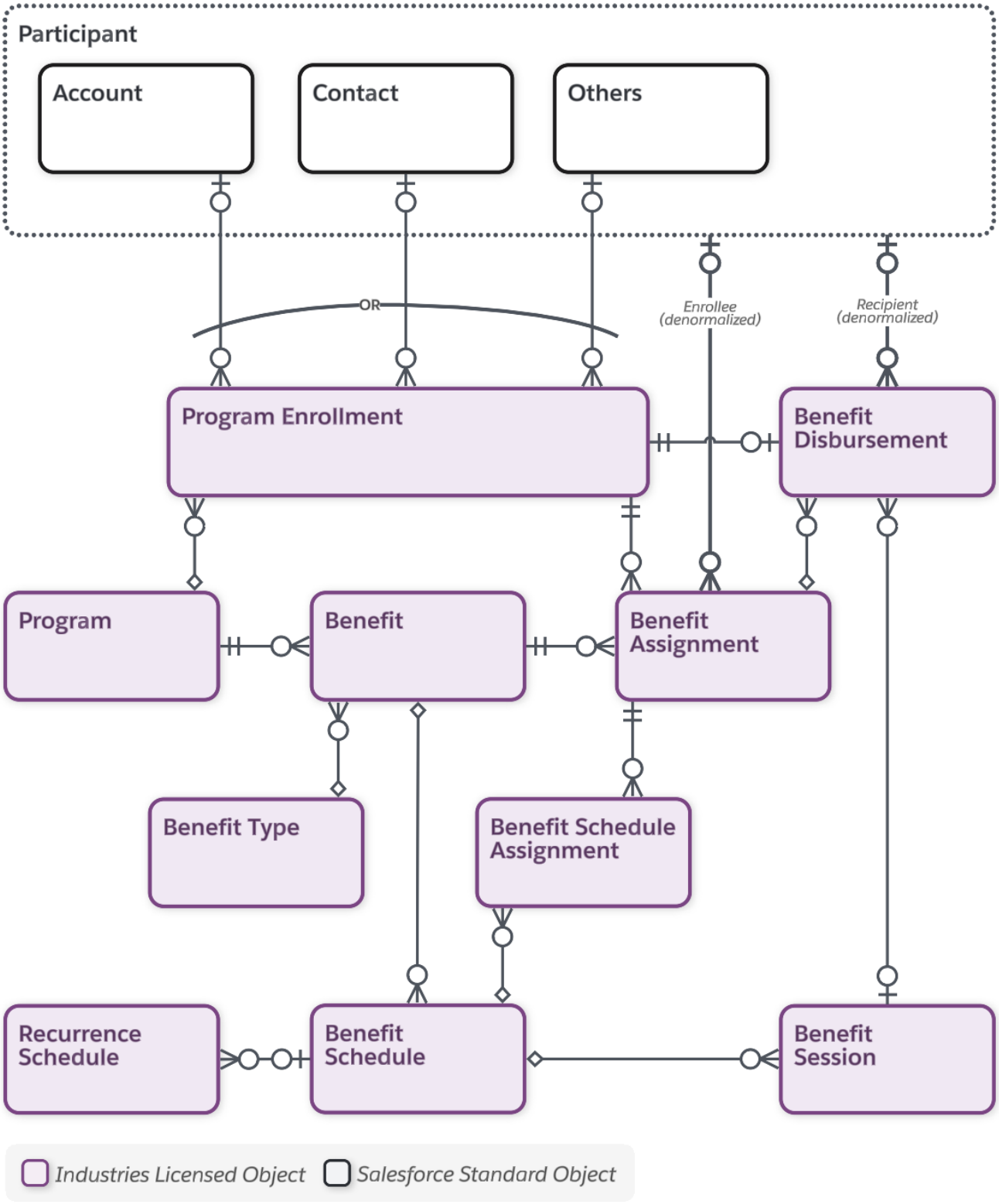


To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**, or view the Fundraising data model.

Program Management Data Model

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

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

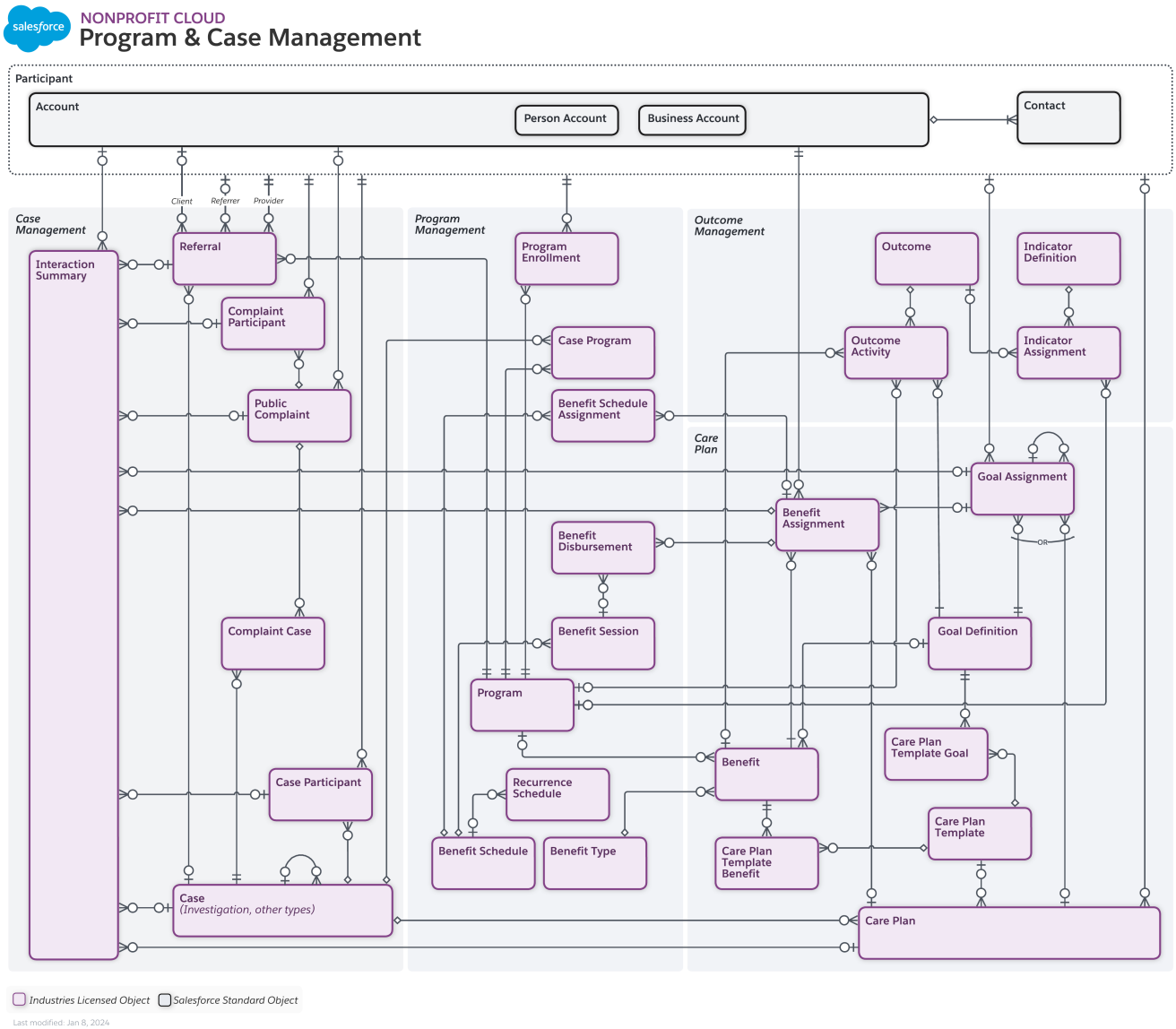


To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

Case Management Data Model

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

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



To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**, or view the Program & Case Management data model.

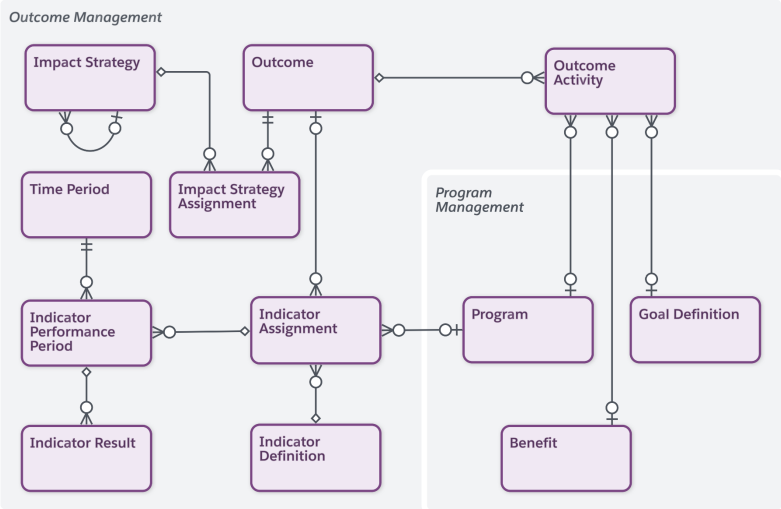
Outcome Management Data Model

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

EDITIONS

Available in: Lightning Experience

Available in: Education Cloud, Energy and Utilities Cloud, Nonprofit Cloud, Nonprofit Cloud for Grantmaking, and Public Sector Solutions. View edition availability.



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

Grantmaking and Budget Management Data Model

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

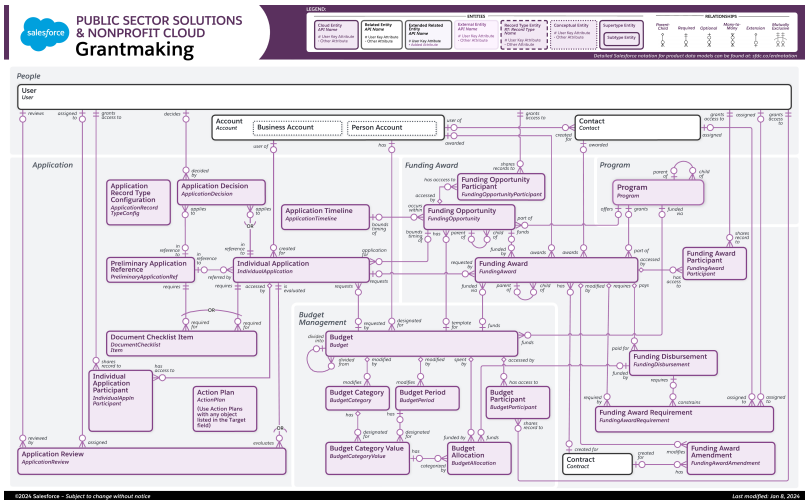
The Grantmaking and Budget Management data model provides a set of objects and fields that you can use to store and manage information about grants you award and the budgets associated with them.

EDITIONS

Available in: Lightning Experience

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

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



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

CHAPTER 3 Case Management

In this chapter ...

- Case Management Standard Objects

This guide provides objects and API information about Case Management for Nonprofits. Built on the platform, Case Management helps case managers assist participants in achieving their goals through individualized plans, collaborative tools, and full participant data.

EDITIONS

Available in: Lightning Experience

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

Case Management Standard Objects

Case Management data model provides objects and fields to manage cases and care plans for your nonprofit organization.

EDITIONS

Available in: Lightning Experience

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

AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a business account and a household account. This object is available in API version 57.0 and later.

CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. This object is available in API version 55.0 and later.

CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. This object is available in API version 55.0 and later.

CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.

CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.

CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

ContactContactRelation

Represents a relationship between contacts. This object is available in API version 57.0 and later.

GoalAssignment

Represents the assignment of a goal. This object is available in API version 55.0 and later.

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.

InteractionAttendee

Represents an attendee of an interaction. This object is available in API version 51.0 and later.

InteractionSummary

Represents the summary of an interaction, including confidentiality information. This object is available in API version 51.0 and later.

PartyRelationshipGroup

Represents a group of people living together such as a household, or a group of people affiliated with each other. This object is available in API version 56.0 and later.

PartyRoleRelation

Represents information about the type of relationship between the participants. This object is available in API version 57.0 and later.

PublicComplaint

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

Referral

Represents the information on client referrals in an organization. This object is available in API version 56.0 and later.

AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a business account and a household account. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the account associated with this account account relationship. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date when the relationship ends.
`HierarchyType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the hierarchy between accounts that are related. For example, an account is related to another account as a parent, peer, or child. Possible values are: • `Child` • `Parent` • `Peer` The default value is `Parent`.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the account is actively involved with the related account. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the account account relationship.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyRoleRelationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The relationship between two accounts. This field is a relationship field. **Relationship Name** PartyRoleRelation **Relationship Type** Lookup **Refers To** PartyRoleRelation
`RelatedAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The related account in the relationship.

Field	Details
	This field is a relationship field. **Relationship Name** RelatedAccount **Relationship Type** Lookup **Refers To** Account
`RelatedInverseRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record that specifies the inverse relationship between the accounts. This field is a relationship field. **Relationship Name** RelatedInverseRecord **Relationship Type** Lookup **Refers To** AccountAccountRelation
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship starts.

CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. This object is available in API version 55.0 and later.

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

Supported Calls

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

Fields

Field	Details
`CarePlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The care plan template associated with the care plan. This is a relationship field. **Relationship Name** CarePlanTemplate **Relationship Type** Lookup **Refers To** CarePlanTemplate
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The case associated with the care plan. This is a relationship field. **Relationship Name** Case **Relationship Type** Master-Detail **Refers To** Case
`CaseProceedingResultId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outcome of a legal case for a participant. This field is a relationship field. Available with a Public Sector Solutions license and in API version 58.0 and later. **Relationship Name** CaseProceedingResult

Field	Details
	Relationship Type Lookup **Refers To** CaseProceedingResult
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim with which the care plan is associated. Available with a Public Sector Solutions license and in API version 59.0 and later. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description for the care plan record.
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date until when the care plan is effective.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care plan record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The account associated with the care plan. This is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Account, Contact
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from when the care plan is effective.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the care plan.

Field	Details
	Possible values are: • `Active` • `Cancelled` • `Completed` • `Draft` • `Proposed`
`TaskJobStatus`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the status of the task in the task queue. Possible values are: • `Completed` • `Failed` • `InProgress` • `Submitted`
`TaskJobStatusMessage`	**Type** textarea **Properties** Nillable **Description** The message that describes the status of the task in the queue.

Associated Objects

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

CarePlanFeed
Feed tracking is available for the object.

CarePlanHistory
History is available for tracked fields of the object.

CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the care plan template record.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care plan template record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the care plan template record owner. This is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the care plan template. Possible values are: • `Draft` • `Inactive` • `Published` The default value is 'Draft'.

CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.

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

Supported Calls

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

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The name of the care plan template benefit record. This is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`CarePlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The care plan template associated with the care plan template benefit. This is a relationship field. **Relationship Name** CarePlanTemplate **Relationship Type** Master-Detail **Refers To** CarePlanTemplate
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the care plan template benefit record.
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the care plan template benefit. Possible values are: • `High` • `Low` • `Medium`

CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.

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

Supported Calls

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

Fields

Field	Details
`CarePlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The care plan template associated with the care plan template goal. This is a relationship field.

Field	Details
	Relationship Name CarePlanTemplate **Relationship Type** Master-Detail **Refers To** CarePlanTemplate
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The goal definition associated with the care plan template goal. This is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the care plan template goal.

Field	Details
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the care plan template goal. Possible values are: • `High` • `Low` • `Medium`

CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

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

Supported Calls

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

Fields

Field	Details
`AuthorizationProof`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** How the participant communicated their consent. This field is available in API version 58.0 and later. Possible values are: • `Email Consent` • `Joint Ownership` • `Power of Attorney` • `Verbal Consent`

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The case associated with the case participant record. This field is a relationship field. **Relationship Name** Case **Relationship Type** Master-Detail **Refers To** Case
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the case participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant associated with the case participant record.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Account, Contact
`PreferredCallTimeFrom`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **Description** The start of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
`PreferredCallTimeTo`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **Description** The end of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
`PreferredCommunicationMode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** How the participant prefers to receive messages. This field is available in API version 58.0 and later. Possible values are: • `Email` • `Phone` • `SMS`
`Role`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the role of the case participant. Possible values are: • `Applicant` • `Inspection Officer` • `Lawyer` • `Observer` • `Perpetrator` • `Primary Caretaker` • `Victim` The default value is `Applicant`.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the case participant. Possible values are: • `Active` • `Inactive`

ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

When a public complaint is raised on the portal, multiple department could be involved and each department can create a case record to track how the complaint is handled. For example, a hazardous chemical complaint can be handled by both the environmental agency and the fire department.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The name of the case that is associated with the complaint. This is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The ID of the complaint being raised.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the complaint case record owner. This is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`PublicComplaintId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The name of the public complaint that is associated to the complaint being raised. This is a relationship field. **Relationship Name** PublicComplaint **Relationship Type** Lookup **Refers To** PublicComplaint

ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

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

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the complaint participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant associated with the complaint participant record. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Account, Contact
`PublicComplaintId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The public complaint associated with the complaint participant record. This field is a relationship field.

Field	Details
	Relationship Name PublicComplaint **Relationship Type** Master-Detail **Refers To** PublicComplaint
`Role`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the role of the complaint participant. Possible values are: • `Observer` • `Perpetrator` • `Reporter` • `Victim`
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the complaint participant. Possible values are: • `Active` • `Inactive` The default value is `Active`.

ContactContactRelation

Represents a relationship between contacts. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the account associated with this contact contact relationship. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship ends.
`HierarchyType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Indicates the type of association to determine the hierarchy of relationship between the two parties. Possible values are: • `Child` • `Parent` • `Peer` The default value is `Parent`.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the contact is actively involved with the related contact. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the contact contact relationship.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`PartyRoleRelationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The relationship between two contacts. This field is a relationship field. **Relationship Name** PartyRoleRelation **Relationship Type** Lookup **Refers To** PartyRoleRelation
`RelatedContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The related contact in the relationship. This field is a relationship field. **Relationship Name** RelatedContact **Relationship Type** Lookup **Refers To** Contact
`RelatedInverseRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record that specifies the inverse relationship between the contacts. This field is a relationship field. **Relationship Name** RelatedInverseRecord **Relationship Type** Lookup

Field	Details
	Refers To ContactContactRelation
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship starts.

GoalAssignment

Represents the assignment of a goal. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`CompletionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the goal is completed.
`CompletionPercentage`	**Type** percent **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Indicates the progress made on the assigned goal in percentage.
`Description`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The description of the goal assignment record.
`GoalAssigneeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The assigees associated with the goal assignment. This is a polymorphic relationship field. **Relationship Name** GoalAssignee **Relationship Type** Lookup **Refers To** Account, Contact
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The goal definition associated with the goal assignment. This is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
`GoalType`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Specifies if the goal applies to a group or an individual.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the goal assignment record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the goal assignment record owner. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The care plan or benefit assignment object associated with the goal assignment. This is a polymorphic relationship field.

Field	Details
	Relationship Name ParentRecord **Relationship Type** Lookup **Refers To** BenefitAssignment, CarePlan
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the goal assignment. Possible values are: • `High` • `Low` • `Medium`
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the assigned goal.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the assigned goal. Possible values are: • `Canceled` • `Completed` • `In Progress` • `Not Started` The default value is 'Not Started'.
`TargetCompletionDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date by when the assigned goal is targeted to be completed.

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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer or partner who attended the interaction.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the interaction.
`EndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction ended.
`InteractionType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The type of interaction. Possible values are: • `Conference` • `Email` • `In Person` • `Phone Call`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location of the interaction.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the interaction.
`ReferenceIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique reference ID of the interaction.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** FinancialDeal, Opportunity
`StartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction started.

Associated Objects

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

InteractionFeed
Feed tracking is available for the object.

InteractionHistory
History is available for tracked fields of the object.

InteractionOwnerSharingRule
Sharing rules are available for the object.

InteractionShare
Sharing is available for the object.

InteractionAttendee

Represents an attendee of an interaction. 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`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the response of the attendee to the interaction. Possible values are: • `Accepted` • `Declined` • `Awaiting Response`
`AttendeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of attendee. Possible values are:

Field	Details
	• External • Internal
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact who attended the interaction.
EmailAddress	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the attendee.
EventId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The event on Salesforce calendar for this attendee.
InteractionId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction for which this attendee record is created.
IsOrganizer	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the attendee is the interaction organizer. The default value is 'false'.
LastReferencedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction attendee.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who attended the interaction.

Associated Objects

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

InteractionAttendeeFeed
Feed tracking is available for the object.

InteractionAttendeeHistory
History is available for tracked fields of the object.

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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer who attended the client interaction.
`ConfidentialityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are: • `Confidential` • `Public`
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The client interaction related to the interaction summary.
`InteractionPurpose`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the purpose of the client interaction. Possible values are: • `Deal Execution` • `Meet and Greet` • `Quarterly Check-In`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MeetingNotes`	**Type** textarea **Properties** Create, Nillable, Update **Description** The detailed record of what transpired during the client interaction.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The title of the interaction summary, capturing the summary of the interaction.
`NextSteps`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The next steps that were decided during the interaction.
`Offering`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The offerings that were discussed in the client interaction. Possible values are: • `Debt Capital Markets` • `Equity Capital Markets` • `Mergers and Acquisitions Advisory`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PartnerAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the partner who attended the client interaction.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the record such as an opportunity associated with a client interaction.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the status of the interaction summary. Possible values are: • `Draft` • `Published`

Associated Objects

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

InteractionSummaryFeed
Feed tracking is available for the object.

InteractionSummaryHistory
History is available for tracked fields of the object.

InteractionSummaryOwnerSharingRule
Sharing rules are available for the object.

InteractionSummaryShare
Sharing is available for the object.

PartyRelationshipGroup

Represents a group of people living together such as a household, or a group of people affiliated with each other. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent account associated with the party relationship group. This field is a relationship field.

Field	Details
	Relationship Name Account **Relationship Type** Lookup **Refers To** Account
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category of the party relationship group. Possible values are: • `Extended Family` • `Meals together` • `Staying under same roof`
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the party relationship group.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date associated with the party relationship group.
`GroupIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total income of the party relationship group.
`GroupSize`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The number of active members associated with the party relationship group.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party relationship group.
`PrimaryAddress`	**Type** address **Properties** Filter, Nillable **Description** The primary address of the party relationship group.
`PrimaryCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary city of the party relationship group.

Field	Details
`PrimaryCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary country of the party relationship group.
`PrimaryGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the primary relationship group's latitude and longitude coordinates. Possible values are: • `Address` • `Block` • `City` • `County` • `ExtendedZip` • `NearAddress` • `Neighborhood` • `State` • `Street` • `Unknown` • `Zip`
`PrimaryLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
`PrimaryLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with Latitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
`PrimaryPostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary postal code of the party relationship group.
`PrimaryState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary state of the party relationship group.
`PrimaryStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary street of the party relationship group.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date associated with the party relationship group.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the party relationship group. Possible values are: • `Active` • `Inactive`

Field	Details
	The default value is `Active`.
`Subtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subclassification of the party relationship group type. Possible values are: • `Extension Household` • `Nuclear Household` • `Three Person Household`
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the party relationship group. Possible values are: • `Group` • `Household` The default value is `Group`.

PartyRoleRelation

Represents information about the type of relationship between the participants. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the party role relationship.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`RelatedInverseRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The record that specifies the inverse relationship between the roles. This field is a relationship field. **Relationship Name** RelatedInverseRecord **Relationship Type** Lookup **Refers To** PartyRoleRelation
`RelatedRoleName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The role that's related to another role in the relationship.
`RelationshipObjectName`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The object that's associated with the relationship. Possible values are: • `Account_Account_Relationship`—Account Account Relationship • `Contact_Contact_Relationship`—Contact Contact Relationship The default value is `Account_Account_Relationship`.
`RoleName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the role in the relationship.
`ShouldCreaInversRoleAuto`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether a role record should be created automatically for the relationship (true) or not (false). The default value is `false`.

PublicComplaint

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the account associated with this complaint. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`BusinessAddress`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Address of the business.
`BusinessName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Name of the business
`CauseSubtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subtype of complaint cause. This field is available in API version 58.0 and later. Possible value is: • `Misleading advertisement or documentation`
`CauseType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of complaint cause. This field is available in API version 58.0 and later. Possible value is: • `Product Communication`
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** Additional details about the complaint. This field is available in API version 51.0 and later.
`CompensationAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Any amount of money offered to resolve the complaint. This field is available in API version 58.0 and later.
`ComplaintCaseId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** This field is deprecated as of API version 49.0.
`ComplaintCaseStatus`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Sort **Description** The status of the related Case. This field is available in API version 58.0 and later. Possible values are: • `New` • `Working` • `Escalated` • `Closed` The default is `New`.
`ComplaintSubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subtype of the complaint. Possible values are: • `Burns` • `Educational Neglect` • `Emotional Neglect` • `Exploitation` • `Fire Safety` • `Isolation` • `Medical Neglect` • `Physical Neglect` • `Rough Treatment` • `Sexual Activities` • `Sexual Exploitation` • `Sexual Exposure` • `Suffocation` • `Terror`

Field	Details
`ComplaintType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of complaint. Possible values are: • `Mental Abuse` • `Neglect` • `Physical Abuse` • `Safety` • `Sexual Abuse`
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of the complaint.
`Email`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Email of the complainant.
`EscalationCause`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason the complaint was escalated. This field is available in API version 58.0 and later. Possible values are: • `Alleged ADA Violation` • `Alleged Discrimination` • `Alleged MLA Violation` • `Alleged SCRA Violation` • `Alleged UDAAP Violation` • `Consumer Protection Agency Involvement`

Field	Details
	• `Lawsuit Filed` • `Media Involvement` • `None` • `Received by Executive Leadership` The default is `None`.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** First name of the complainant.
`IncidentDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Date of the incident.
`IsComplainantAuthorized`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether the person who filed the complaint is an authorized representative of the Account. This field is available in API version 58.0 and later. The default value is `false`.
`IsReporterConfidential`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Reporter's request for confidentiality. The default value is `false`.
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Last name of the complainant.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user viewed this record.
`MobileNumber`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mobile number of the complainant.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the complaint.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the complaint owner. **Relationship Name** Owner **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Priority of the complaint. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`ProductType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The product that the complaint is about. This field is available in API version 58.0 and later. Possible values are: • `ATM / debit card` • `Credit Card or Prepaid Card` • `Insurance` • `Investments` • `Merchant Services` • `Mobile / electronic banking` • `Money transfers, virtual currency, and money services` • `Mortgage / Home Finance` • `Other` • `Personal Loan / other loans` • `Vehicle loan or lease`
`ReceivedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date the complaint was received. This field is available in API version 58.0 and later.
`ReporterAddress`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Address of the reporter for further communication.
`ReporterCategory`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Role of the reporter in the organization. Possible values are: • `Childcare Providers` • `Healthcare worker` • `Law Enforcement` • `Medical Examiners` • `Mental Health Professionals` • `Other` • `School Personnel` • `Social Worker` The default value is `School Personnel`.
`ReporterOrganization`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Organization that the reporter is part of.
`ShouldInclInRegulatoryRpt`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Whether this complaint must be included in a regulatory report. This field is available in API version 58.0 and later. The default value is `false`.
`SourceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The source of the complaint. This field is available in API version 58.0 and later. Possible values are: • `Branch` • `Consumer Protection Agency` • `Contact Centre` • `Mobile App` • `Regulatory Agency` • `Social Media` • `Web Chat`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the complaint. Possible values are: • `In Review` • `Resolved` • `Submitted`
`Subject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subject of the complaint. This field is available in API version 51.0 and later.

Associated Objects

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

PublicComplaintFeed
Feed is available for the object.

PublicComplaintHistory
History is available for the object.

PublicComplaintOwnerSharingRule
Sharing rules are available for the object.

PublicComplaintShare
Sharing is available for the object.

Referral

Represents the information on client referrals in an organization. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The case associated with the referral. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The category of referral.
`ClientEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the referred client.
`ClientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the referred client. This field is a relationship field. **Relationship Name** Client **Relationship Type** Lookup **Refers To** Account
`ClientLanguage`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The languages that the referred client speaks. Possible values are: • `Arabic` • `Chinese` • `Dutch` • `English` • `French` • `German` • `Hindi` • `Portuguese` • `Russian`

Field	Details
	• `Spanish`
`ClientName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the referred client.
`ClientPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the referred client.
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** Additional details about the referral.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the referral.
`IsSelfReferred`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the referral is made by the client. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the referral.
`OutboundSourceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source of an outbound referral. This field is a polymorphic relationship field. **Relationship Name** OutboundSource **Relationship Type** Lookup **Refers To** Benefit Assignment, Case, Referral
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the priority of the referral. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that's associated with the referral. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`ProviderEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the person or the organization that the client is being referred to.

Field	Details
ProviderFacilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The practitioner or provider facility associated with the referral. Available in API version 59.0 and later. This field is a polymorphic relationship field. **Relationship Name** ProviderFacility **Relationship Type** Lookup **Refers To** CareProviderFacilitySpecialty, HealthcarePractitionerFacility
ProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account or contact associated with the person or the organization that the client is being referred to. This field is a polymorphic relationship field. **Relationship Name** Provider **Relationship Type** Lookup **Refers To** Account, Contact, HealthcareProvider
ProviderName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the person or the organization that the client is being referred to.
ProviderOrg	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The organization that the client is being referred to.
`ProviderPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the person or the organization that the client is being referred to.
`RecordTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is a relationship field. **Relationship Name** RecordType **Relationship Type** Lookup **Refers To** RecordType
`ReferralDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the referral is received.
`ReferralType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies whether the referral is inbound or outbound. Possible values are: • `INBOUND`—Inbound • `OUTBOUND`—Outbound

Field	Details
`ReferrerEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the person or the organization that referred the client.
`ReferrerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account or contact associated with the person or the organization that referred the client. This field is a polymorphic relationship field. **Relationship Name** Referrer **Relationship Type** Lookup **Refers To** Account, Contact
`ReferrerName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the person or the organization that referred the client.
`ReferrerOrg`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The organization that referred the client.
`ReferrerPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The phone number of the person or the organization that referred the client.
`Result`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The outcome of the referral.
`ResultCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category of the referral result. Possible values are: • `Approved` • `Client Declined Services` • `Pending` • `Referred Elsewhere` • `Rejected`
`Source`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source of the referral. Possible values are: • `Application` • `Email` • `Message` • `Other` • `Phone` • `Social Media` • `Walk-In`
`Status`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the referral. Possible values are: • `Approved` • `Enrolled` • `In Review` • `New` • `Rejected`
`Title`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The title of the referral.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the usage of the referral.

Associated Objects

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

ReferralFeed
Feed tracking is available for the object.

ReferralHistory
History is available for tracked fields of the object.

ReferralOwnerSharingRule
Sharing rules are available for the object.

ReferralShare
Sharing is available for the object.

CHAPTER 4 Fundraising

In this chapter ...

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

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

EDITIONS

Available in: Lightning Experience

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

Fundraising Standard Objects

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

EDITIONS

Available in: Lightning Experience

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

PaymentInstrument

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

DonorGiftSummary

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AverageGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The average value of the gifts the donor directly contributed. Calculated nightly by Data Processing Engine.
`BestGiftYear`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year when the donor directly contributed the largest value of gifts. Calculated nightly by Data Processing Engine.
`CurrentRecurringStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date of the donor's first recurring gift transaction for the active recurring gift. Calculated nightly by Data Processing Engine.
`CurrentYearGiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of gifts the donor directly contributed this year. Calculated nightly by Data Processing Engine.
`DaysSinceLastGift`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of days since the donor gave a direct contribution. This field is a calculated field. Calculated nightly by Data Processing Engine.
`DonorId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The person, household, or organization account associated with the donor gift summary. This field is a relationship field. **Relationship Name** Donor **Relationship Type** Master-Detail **Refers To** Account
`FirstGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the first gift the donor directly contributed. Calculated nightly by Data Processing Engine.

Field	Details
`FirstGiftCampaignId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The first campaign the donor contributed to. Calculated nightly by Data Processing Engine. This field is a relationship field. **Relationship Name** FirstGiftCampaign **Relationship Type** Lookup **Refers To** Campaign
`FirstGiftDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the first gift directly contributed by the donor. Calculated nightly by Data Processing Engine.
`FirstRecurringStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the donor's first recurring gift transaction. Calculated nightly by Data Processing Engine.
`FirstSoftCreditAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the first gift the donor influenced but didn't directly contribute. Calculated nightly by Data Processing Engine.
`FirstSoftCreditDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date of the first gift the donor influenced but didn't directly contribute. Calculated nightly by Data Processing Engine.
`GiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of gifts the donor directly contributed. Calculated nightly by Data Processing Engine.
`GiftsLastYearAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of gifts the donor directly contributed last year. Calculated nightly by Data Processing Engine.
`GiftsThisYearAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of gifts the donor directly contributed this year. Calculated nightly by Data Processing Engine.
`GiftsTwoYearsAgoAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of gifts the donor directly contributed two years ago. Calculated nightly by Data Processing Engine.
`HighestGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The largest single gift the donor directly contributed. Calculated nightly by Data Processing Engine.
`HighestGiftYearAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The largest value of gifts the donor directly contributed in one year. Calculated nightly by Data Processing Engine.
`HighestSoftCreditAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the largest single gift the donor influenced but didn't directly contribute.
`HighestSoftCreditDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the largest single gift the donor influenced but didn't directly contribute. Calculated nightly by Data Processing Engine.
`LastGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the donor's most recent, directly-contributed gift. Calculated nightly by Data Processing Engine.
`LastGiftDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the donor's most recent, directly-contributed gift.

Field	Details
LastRecurringPaymentDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the donor last made a payment toward a recurring gift. Calculated nightly by Data Processing Engine.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastSoftCreditAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the last gift the donor influenced but didn't directly contribute. Calculated nightly by Data Processing Engine.
LastSoftCreditDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the last gift the donor influenced but didn't directly contribute. Calculated nightly by Data Processing Engine.
LastTwoYearGiftCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of gifts the donor directly contributed two years ago. Calculated nightly by Data Processing Engine.
LastViewedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view.
`LastYearGiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of gifts the donor directly contributed last year. Calculated nightly by Data Processing Engine.
`LowestGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The smallest single gift the donor directly contributed. Calculated nightly by Data Processing Engine.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The auto-numbered name that uniquely identifies the donor gift summary.
`SecondGiftDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the second gift directly contributed by the donor. Calculated nightly by Data Processing Engine.
`SoftCreditCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The total number of gifts the donor influenced and didn't directly contribute. Calculated nightly by Data Processing Engine.
`TotalGiftsAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of gifts the donor directly contributed. Calculated nightly by Data Processing Engine.
`TotalHardSoftCredits`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of gifts the donor directly contributed and influenced. Calculated nightly by Data Processing Engine.
`TotalHardSoftCreditsAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total value of all gifts the donor directly contributed and influenced. Calculated nightly by Data Processing Engine.
`TotalPaidRcrInstallments`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of recurring installments the donor directly contributed. Calculated nightly by Data Processing Engine.
`TotalPaidRcrInstlAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The value of all of the recurring installments the donor directly contributed. Calculated nightly by Data Processing Engine.

GiftBatch

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the gift batch.
`DoesTotalGiftValueMatch`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the total and estimated amount of gifts or total and estimated count of gifts in the gift batch match (`true`) or not (`false`). The default value is `false`.
`EstimatedGiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The expected number of gifts in the gift batch.
`ExpectedValueofGiftsinBatch`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** When a single currency is accepted, this field shows the expected total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.
`FailedGiftCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of gifts that failed to process.
`LastProcessedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The last date and time when the gift batch was processed.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.

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

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the gift batch. Possible values are: • `Failed` • `In Progress` • `Partially Processed` • `Processed` • `Unprocessed` The default value is `Unprocessed`.
`StatusReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for a gift batch status.
`TotalBatchAmount`	**Type** double **Properties** Filter, Nillable, Sort **Description** When a single currency is accepted, this field shows the total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.
`TotalGiftCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The total number of gifts in the gift batch.

Associated Objects

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

GiftBatchFeed
Feed tracking is available for the object.

GiftBatchHistory
History is available for tracked fields of the object.

GiftBatchShare
Sharing is available for the object.

GiftCommitment

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

Supported Calls

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

Special Access Rules

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

Fields

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

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

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

Field	Details
	Description Specifies the formality type of the commitment. Possible values are: • `Verbal` • `Written` The default value is `Verbal`.
`FulfillmentType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies whether the commitment fulfillment depends on one or more conditions or is unconditional. Possible values are: • `Conditional` • `Unconditional` The default value is `Unconditional`.
`GiftVehicle`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the vehicle that's used to fulfill a gift commitment. Possible values are: • `Bequest` • `Charitable Gift Annuity` • `Donor Advised Fund` • `Life Insurance` • `Other` • `Pooled Income Fund` • `Trust`
`GiftVehicleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the type of gift vehicle that fulfills the gift commitment. Possible values are: • `Charitable Lead Trust` • `Charitable Remainder Trust` • `Deferred Gift Annuity` • `Flexible Gift Annuity` • `Immediate Gift Annuity` • `Other`
`IsAssetTransferExpected`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the donor intends to transfer non-monetary assets or not. The default value is `false`.
`LastPaidTransactionDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date of the last paid transaction for the commitment.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` isn't null, the user accessed this record or list view indirectly.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the gift commitment.
`NextTransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected amount of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.
`NextTransactionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The opportunity associated with this commitment. This field is a relationship field. **Relationship Name** Opportunity **Relationship Type** Lookup **Refers To** Opportunity
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`RecurrenceType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of recurrence of a commitment. Possible values are: • `Fixed Length` • `Open Ended` The default value is `Open Ended`.
`ScheduleType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the schedule and type of the commitment. Possible values are: • `Custom` • `Recurring` The default value is `Recurring`.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the commitment. Possible values are:

Field	Details
	• `Active` • `Closed` • `Draft` • `Failing` • `Lapsed` • `Paused` The default value is `Draft`.
`TotCommitmentScheduleAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total expected donation amount that's calculated across all schedules in this commitment. This field is a calculated field.
`TotExpcAssetMaturityVal`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected maturity value of all the committed assets for a commitment.
`TotExpcAssetTransferVal`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total expected value of all the committed assets when they're transferred for a commitment.
`TotalAssetPresentValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total current value of all the committed assets for a commitment.
`TotalPaidTransactionAmount`	**Type** currency

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

Associated Objects

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

GiftCommitmentFeed
Feed tracking is available for the object.

GiftCommitmentHistory
History is available for tracked fields of the object.

GiftCommitmentShare
Sharing is available for the object.

GiftCmtChangeAttrLog

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field	Details
`ChangeType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of change to the commitment. Possible values are: • `Amount` • `Frequency` • `Frequency and Amount` The default value is `Frequency`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The effective date for the commitment change.
`GiftCommitmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The commitment associated with this gift commitment schedule. This field is a relationship field. **Relationship Name** GiftCommitment **Relationship Type** Lookup **Refers To** GiftCommitment
`GiftCommitmentScheduleId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift commitment schedule associated with the gift transaction. This field is a relationship field.

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

Field	Details
	Refers To OutreachSourceCode

Associated Objects

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

GiftCmtChangeAttrLogFeed
Feed tracking is available for the object.

GiftCmtChangeAttrLogHistory
History is available for tracked fields of the object.

GiftCommitmentSchedule

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`CampaignId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The campaign associated with this gift commitment schedule. All gift transactions associated with this gift commitment schedule are associated with this campaign. This field is a relationship field. **Relationship Name** Campaign

Field	Details
	Relationship Type Lookup **Refers To** Campaign
`CampaignName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the campaign associated with the gift commitment schedule.
`CommitmentUpdateReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason the gift commitment schedule changed. Possible values are: • `Payment Method Declined` • `Financial Hardship`
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the new schedule for this gift commitment.
`GiftCommitmentId`	**Type** Master-Detail **Properties** Create, Filter, Group, Sort **Description** The commitment associated with this gift commitment schedule. A value is always required in this field to save the record. This field is a relationship field. **Relationship Name** GiftCommitment **Relationship Type** Master-Detail

Field	Details
	Refers To GiftCommitment
`GiftCommitmentName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the related gift commitment.
`GiftCommitmentSchdBefEditId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The schedule that's associated with the current gift commitment schedule before it was edited This field is a relationship field. **Relationship Name** GiftCommitmentSchdBefEdit **Relationship Type** Lookup **Refers To** GiftCommitmentSchedule
`GiftCommitmentStatus`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Sort **Description** The status of the gift commitment that's fulfilled by the schedule. Possible values are: • `Active` • `Closed` • `Draft` • `Failing` • `Lapsed` • `Paused` The default value is `Draft`.

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

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

Field	Details
`StartDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The start date of the new schedule for this gift commitment. A value is always required in this field to save the record.
`TotalScheduleAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected total amount of all gift transactions associated with the gift commitment schedule.
`TransactionAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The gift amount of each transaction associated with the gift commitment schedule. A value is always required in this field to save the record.
`TransactionDay`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction will be created on the last day for months that don't have that many days. Possible values are the numbers 1 through 30 or the value `LastDay`. The default value is `1`. Always required when the Transaction Period is Monthly.
`TransactionInterval`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

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

Associated Objects

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

GiftCommitmentScheduleFeed
Feed tracking is available for the object.

GiftCommitmentScheduleHistory
History is available for tracked fields of the object.

GiftDefaultDesignation

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AllocatedPercentage`	**Type** percent **Properties** Create, Filter, Sort, Update **Description** The percentage of the gift that's allocated to this designation.
`GiftDesignationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The gift designation associated with this gift default designation. A value is always required in this field to save the record. This field is a relationship field. **Relationship Name** GiftDesignation **Relationship Type** Lookup **Refers To** GiftDesignation

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

Field	Details
	Description The parent record of this gift default designation. A value is always required in this field to save the record. This field is a polymorphic relationship field. **Relationship Name** ParentRecord **Relationship Type** Lookup **Refers To** Campaign, GiftCommitment, Opportunity

Associated Objects

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

GiftDefaultDesignationFeed
Feed tracking is available for the object.

GiftDefaultDesignationHistory
History is available for tracked fields of the object.

GiftDefaultDesignationShare
Sharing is available for the object.

GiftDesignation

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AverageTransactionAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The average value of all paid gift transactions associated with this gift designation. Calculated nightly by Data Processing Engine.
`CurrentYearTransactionCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count of the current year's paid transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`CurrentYearTrxnAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of current calendar year's transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the gift designation.
`FirstPaidTransactionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the first paid gift transaction associated with this gift designation. Calculated nightly by Data Processing Engine.
`HighestTransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The highest transaction amount associated with the gift designation. Calculated nightly by Data Processing Engine.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the gift designation is active (`true`) or not (`false`). The default value is `true`.
`IsDefault`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the unrestricted gift amount is to be allocated to this designation as default (true) or not (false). There can only a single Designation record with this set to true at a time. The default value is `false`.
`LastPaidTransactionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the most recent paid gift transaction associated with this gift designation. Calculated nightly by Data Processing Engine.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastTwoYearTrxnAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount of the last two years' transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`LastTwoYearTrxnCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The amount of the last two years' transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view.
`LastYearTransactionCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count of last year's paid transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`LastYearTrxnAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of previous calendar year's transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`LowestTransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount of previous calendar year's transactions that are associated with the gift designation. Calculated nightly by Data Processing Engine.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the gift designation.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`TotalTransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total transaction amount that's associated with the gift designation. Calculated nightly by Data Processing Engine.
`TotalTransactionCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total count of paid transactions associated with the gift designation. Calculated nightly by Data Processing Engine.

Associated Objects

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

GiftDesignationFeed
Feed tracking is available for the object.

GiftDesignationHistory
History is available for tracked fields of the object.

GiftDesignationShare
Sharing is available for the object.

GiftEntry

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date on the check that is used as the payment method for the gift.
`City`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city where the donor resides.
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country where the donor resides.
`DonorCoverAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The fee amount that a donor pays in addition to the gift amount.
`DonorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person, household, or organization account associated with the gift. This field is a relationship field. **Relationship Name** Donor **Relationship Type** Lookup **Refers To** Account

Field	Details
`Email`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email of the donor.
`ExpiryMonth`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The month of the credit card expiration date. This field is available from API version 60.0 and later.
`ExpiryYear`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year of the credit card expiration date. This field is available from API version 60.0 and later.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The first name of the donor.
`GiftAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The amount of the gift.
`GiftBatchId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The parent gift batch that's associated with the gift entry. This field is a relationship field. **Relationship Name** GiftBatch **Relationship Type** Lookup **Refers To** GiftBatch
`GiftCommitmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift commitment that's associated with the gift entry. This field is a relationship field. **Relationship Name** GiftCommitment **Relationship Type** Lookup **Refers To** GiftCommitment
`GiftDesignation1Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount to be allocated to designation 1.
`GiftDesignation1Id`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the designation 1 to which the gift amount is to be allocated. This field is a relationship field. **Relationship Name** GiftDesignation1

Field	Details
	Relationship Type Lookup **Refers To** GiftDesignation
`GiftDesignation1Percent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of gift amount to be allocated to designation 1 if the direct amount isn't being allocated.
`GiftDesignation2Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount to be allocated to designation 2.
`GiftDesignation2Id`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the designation 2 to which the gift amount is to be allocated. This field is a relationship field. **Relationship Name** GiftDesignation2 **Relationship Type** Lookup **Refers To** GiftDesignation
`GiftDesignation2Percent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of gift amount to be allocated to designation 2 if the direct amount isn't being allocated.

Field	Details
`GiftDesignation3Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount to be allocated to designation 3.
`GiftDesignation3Id`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the designation 3 to which the gift amount is to be allocated. This field is a relationship field. **Relationship Name** GiftDesignation3 **Relationship Type** Lookup **Refers To** GiftDesignation
`GiftDesignation3Percent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of gift amount to be allocated to designation 3 if the direct amount isn't being allocated.
`GiftProcessingResult`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The processing result of the gift entry record.
`GiftProcessingStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the processing status of the gift entry. Possible values are: • `Failure` • `New` • `Success` The default value is `New`.
`GiftReceivedDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the gift is received.
`GiftTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift transaction that's associated with the gift entry. This field is a relationship field. **Relationship Name** GiftTransaction **Relationship Type** Lookup **Refers To** GiftTransaction
`GiftType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of gift that's associated with the gift entry. Possible values are: • `Individual` • `Organizational` The default value is `Individual`.

Field	Details
`HomePhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The home phone number of the donor.
`IsSetAsDefault`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the values in the gift entry are used as default values in other gift entries of the gift batch or not. The default value is `false`.
`Last4`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last 4 digits of the credit card or bank account. This field is available from API version 60.0 and later.
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last name of the donor.
`LastProcessedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the gift entry was last processed.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` isn't null, the user accessed this record or list view.
`MobilePhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The mobile number of the donor.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the gift entry record.
`OrganizationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the donating organization that's associated with the gift entry.
`OutreachSourceCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outreach source code that's associated with the campaign for the gift entry record.

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

Field	Details
	• `Credit Card` • `Cryptocurrency` • `In-Kind` • `PayPal` • `Stock` • `Unknown` • `Venmo`
`PostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code from the donor's address.
`Salutation`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the honorific abbreviation, word, or phrase to be used in front of the donor's name in greetings, such as Dr. or Mrs. Possible values are: • `Dr.` • `Mr.` • `Mrs.` • `Ms.` • `Mx.` • `Prof.`
`SoftCreditInformation`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the soft credit, such as the name of the soft creditor, role, and amount or percentage of soft credit allocated to the soft creditor.
`State`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the state or province where the donor resides.
`Street`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street details from the donor's address.
`TotalTransactionFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total transaction fees charged by the payment processor for the gift. For example, application fees, processing fees.

GiftRefund

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`Amount`	**Type** currency

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

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

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

Associated Objects

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

GiftRefundFeed
Feed tracking is available for the object.

GiftRefundHistory
History is available for tracked fields of the object.

GiftSoftCredit

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`GiftTransactionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The gift transaction associated with this soft credit. This field is a relationship field. **Relationship Name** GiftTransaction **Relationship Type** Master-Detail **Refers To** GiftTransaction
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` isn't null, the user accessed this record or list view
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The unique, auto-numbered name of the gift soft credit.
`PartialAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the soft credit when it isn't the full transaction amount.
`PartialPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the full transaction amount for this soft credit when it isn't the full transaction amount. Note: Soft Credit percent values don't need to total to 100% when there are multiple soft credit records.
`RecipientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person account that's associated with the soft credit. This field is a relationship field. **Relationship Name** Recipient **Relationship Type** Lookup **Refers To** Account

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

Associated Objects

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

GiftSoftCreditFeed
Feed tracking is available for the object.

GiftSoftCreditHistory
History is available for tracked fields of the object.

GiftSoftCreditOwnerSharingRule
Sharing rules are available for the object.

GiftTransaction

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field	Details
	Refers To Campaign
`CheckDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on the check.
`CurrentAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total amount of the gift transaction and donor cover after refunds. This field is a calculated field.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the gift transaction.
`DonorCoverAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount the donor added to their gift to cover fees.
`DonorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person, household, or organization account associated with the gift transaction. This field is a relationship field. **Relationship Name** Donor

Field	Details
	Relationship Type Lookup **Refers To** Account
`GatewayReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference of the transaction that the gateway assigned. This field is available from API version 60.0 and later.
`GatewayTransactionFee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The transaction fee charged by the payment gateway. This field is available from API version 60.0 and later.
`GiftCommitmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift commitment associated with the gift transaction. This field is a relationship field. **Relationship Name** GiftCommitment **Relationship Type** Lookup **Refers To** GiftCommitment
`GiftCommitmentScheduleId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift commitment schedule associated with the gift transaction.

Field	Details
	This field is a relationship field. **Relationship Name** GiftCommitmentSchedule **Relationship Type** Lookup **Refers To** GiftCommitmentSchedule
`GiftType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of gift that's associated with the gift transaction. Possible values are: • `Individual` • `Organizational` The default value is `Individual`.
`IsFullyRefunded`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Set to `true` when **Status** equals `Fully Refunded`. You can query and filter on this field, but you cannot directly set the value.
`IsPaid`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Set to `true` when **Status** equals `Paid` and **Current Amount** equals 0. You can query and filter on this field, but you cannot directly set the value.
`IsPartiallyRefunded`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field	Details
	Description Set to true when **Status** equals `Paid` and **Current Amount** is greater than 0. You can query and filter on this field, but you cannot directly set the value.
`IsWrittenOff`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Set to true when **Status** equals `Written-Off`. You can query and filter on this field, but you cannot directly set the value.
`LastGatewayErrorMessage`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The most recent error message that's received by the gateway. This field is available from API version 60.0 and later.
`LastGatewayProcessedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time of the last processing attempt by the gateway. This field is available from API version 60.0 and later.
`LastGatewayResponseCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The most recent response code that's received by the gateway. This field is available from API version 60.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` isn't null, the user accessed this record or list view.
`MatchingEmployerTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gift transaction made by the employer that matches the gift transaction. This field is a relationship field. **Relationship Name** MatchingEmployerTransaction **Relationship Type** Lookup **Refers To** GiftTransaction
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the gift transaction.
`OriginalAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The original amount of gift transaction that includes donor cover and excludes the transaction fees. A value is always required in this field to save the record.

Field	Details
`OutreachSourceCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outreach source code associated with the gift transaction. This field is a relationship field. **Relationship Name** OutreachSourceCode **Relationship Type** Lookup **Refers To** OutreachSourceCode
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference number associated with the payment method for the gift, such as check number, transaction order number, merchant order number.
`PaymentInstrumentId`	**Type** lookup **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The Payment Instrument used to complete the transaction. This field is available from API version 60.0 and later. This field is a relationship field. **Relationship Name** PaymentInstrument **Relationship Type** Lookup **Refers To** PaymentInstrument
`PaymentMethod`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the payment method used to complete the gift transaction. A value is always required in this field to save the record. Possible values are: • `ACH` • `Asset` • `Cash` • `Check` • `Credit Card` • `Cryptocurrency` • `In-Kind` • `PayPal` • `Stock` • `Unknown` • `Venmo`
`ProcessorReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference of the payment processor associated with the payment instrument. This field is available from API version 60.0 and later.

Field	Details
`ProcessorTransactionFee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The transaction fee charged by the payment processor. This field is available from API version 60.0 and later.
`RefundedAmount`	**Type** currency **Properties** Defaulted on create, Filter, Nillable, Sort **Description** The amount of the original gift transaction that was refunded. This field is a calculated field.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies the status of the gift transaction. A value is always required in this field to save the record. Possible values are: • `Canceled` • `Failed` • `Fully Refunded` • `Paid` • `Pending` • `Unpaid` • `Written-Off` The default value is `Unpaid`.
`TotalTransactionFee`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total amount of fees charged by the payment gateway and processor for this transaction. This field is available from API version 60.0 and later.

Field	Details
	This field is a calculated field.
`TransactionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the donor completed the gift transaction.
`TransactionDueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expected date of the scheduled gift transaction.

Associated Objects

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

GiftTransactionFeed
Feed tracking is available for the object.

GiftTransactionHistory
History is available for tracked fields of the object.

GiftTransactionShare
Sharing is available for the object.

GiftTransactionDesignation

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

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

Supported Calls

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

Special Access Rules

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

Fields

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

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

Associated Objects

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

GiftTransactionDesignationFeed
Feed tracking is available for the object.

GiftTransactionDesignationHistory
History is available for tracked fields of the object.

GiftTransactionDesignationShare
Sharing is available for the object.

GiftTribute

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

Supported Calls

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

Special Access Rules

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

Fields

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

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

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

Field	Details
	Relationship Name NotificationContact **Relationship Type** Lookup **Refers To** Account
`NotificationContactName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the person who should be notified of the tribute gift transaction.
`NotificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the recipient was notified about the tribute.
`NotificationEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email that's used to notify a person about the tribute gift transaction.
`NotificationInfo`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the person who should be notified of the tribute gift transaction.
`NotificationMessage`	**Type** textarea **Properties** Create, Nillable, Update **Description** The notification message that's sent for the tribute gift transaction.

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

Associated Objects

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

GiftTributeFeed
Feed tracking is available for the object.

GiftTributeHistory
History is available for tracked fields of the object.

GiftTributeShare
Sharing is available for the object.

OutreachSourceCode

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AudienceCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of person accounts, contacts, and businesses in this audience.
`CampaignId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent campaign associated with this source code. This field is a relationship field. **Relationship Name** Campaign **Relationship Type** Lookup **Refers To** Campaign

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the source code.
`FocusSegmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lists individuals who are segmented for this source code. This field is available with a Data Cloud license. This field is a relationship field. **Relationship Name** MarketSegment **Relationship Type** Lookup **Refers To** MarketSegment
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` isn't null, the user accessed this record or list view.
`MessageChannel`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The channel used for the message from which the donation originated. This field is available from API version 60.0 and later. Possible values are: • `Digital Paid` • `Direct Mail` • `Email` • `Organic Web` • `Physical` • `SMS` • `Share Partner` • `Social Organic` • `Social Paid`
`MessageChannelPlatform`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outreach message channel platform from which the donation originated. This field is available from API version 60.0 and later.
`MessageChannelPlatformAccount`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The platform account used to send the outreach message. This field is available from API version 60.0 and later.
`MessageContent`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outreach message content. This field is available from API version 60.0 and later.
`MessageContentTitle`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The outreach message title. This field is available from API version 60.0 and later.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the source code.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SourceCode`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The unique source code. This field is unique within your organization.
`SourceCodeBaseUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The base URL for the outreach source code. This field is available from API version 60.0 and later.

Field	Details
`SourceCodeUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL with UTM codes that's generated for the outreach source code. This field is available from API version 60.0 and later.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The status of the source code. Possible values are: • `Active` • `Archived` • `Inactive` The default value is `Active`.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage of the outreach source code. Possible values are: • `Fundraising` The default value is `Fundraising`.

Associated Objects

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

OutreachSourceCodeFeed
Feed tracking is available for the object.

OutreachSourceCodeHistory
History is available for tracked fields of the object.

OutreachSourceCodeShare
Sharing is available for the object.

OutreachSummary

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AverageGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The average amount of all gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`AverageOnetimeGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The average amount of all one-time, non-recurring gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`AverageRecurringGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The average amount of all recurring gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`CampaignId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The campaign associated with this outreach gift summary. This field is unique within your organization. This field is a relationship field. **Relationship Name** Campaign **Relationship Type** Lookup **Refers To** Campaign
`DonorCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of unique donors in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`GiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description**
`OnetimeDonorCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of contacts who gave a onetime, non-recurring donation in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`OutreachSourceCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outreach source code associated with this outreach gift summary. This field is unique in your organization. This field is a relationship field. **Relationship Name** OutreachSourceCode **Relationship Type** Lookup **Refers To** OutreachSourceCode
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`RecurringDonorCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of contacts who gave a recurring donation in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`ResponseRate`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of responses received from donors in the outreach source code or campaign. Calculated nightly by Data Processing Engine.
`TotalGiftTransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of all paid gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`TotalOnetimeGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of all one-time gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.
`TotalRecurringGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of all recurring gifts in response to this outreach source code or campaign. Calculated nightly by Data Processing Engine.

Associated Objects

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

OutreachSummaryFeed
Feed tracking is available for the object.

OutreachSummaryHistory
History is available for tracked fields of the object.

OutreachSummaryShare
Sharing is available for the object.

PaymentInstrument

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

Supported Calls

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

Special Access Rules

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

Fields

Field	Details
`AccountHolderName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the Payment Instrument Holder.
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Account or PersonAccount that is using the payment instrument. This field is a relationship field. **Relationship Name** Account

Field	Details
	Relationship Type Lookup **Refers To** Account
`BankAccountHolderType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Determines if the bank account holder is an individual or a company.
`BankAccountNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The bank account number used for payment.
`BankAccountType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of the Bank Account.
`BankCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Code of bank associated with the bank account.
`BankName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of bank associated with the bank account.
`CardBrand`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The credit card brand, network, or issuer.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The currency ISO code. This field is hidden when multicurrency is off. Possible values are: • `AUD`—Australian Dollar • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`DigitalWalletProvider`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The provider of the digital wallet.
`ExpiryMonth`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expire month if payment method is credit card.
`ExpiryYear`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expire year if payment method is credit card.
`GatewayName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the payment gateway.
`GatewayReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A reference number from the gateway for this payment instrument.
`Last4`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Last 4 digits of payment method.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The unique, auto-numbered name of the payment instrument.
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentProcessorName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the payment processor.
`ProcessorReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference of the payment processor associated with the payment instrument.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the payment instrument. Possible values are: • `ACH` • `BACS Debit` • `BECS Debit` • `Bancontact` • `Credit Card` • `PayPal` • `SEPA Direct Debit` • `Venmo`

Field	Details
	• `iDEAL`

Associated Objects

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

PaymentInstrumentFeed
Feed tracking is available for the object.

PaymentInstrumentHistory
History is available for tracked fields of the object.

PaymentInstrumentShare
Sharing is available for the object.

Fundraising Fields on Standard Objects

Fundraising includes fields that are available on standard Salesforce objects. These fields are available only in orgs where Nonprofit Cloud is enabled.

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

ContactProfile

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

Supported Calls

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

Fields

Field	Details
`AssetLiquidationValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of assets that can be liquidated within 90 days.

Field	Details
`BusinessOwnershipValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of private businesses the contact owns.
`Income`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The annual income amount of the contact.
`Location`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the contact currently resides.
`OtherAssetsValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the contact's assets that aren't covered by other ways of measuring net worth.
`OtherNonprofitGiftAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of donations the contact has given to other nonprofits.
`OtherNonprofitGiftCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of donations the contact has given to other nonprofits.

Field	Details
`RealEstateValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of real estate the contact owns.
`RecurringDonorType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of recurring donor. Possible values are: • `Active` • `Former` • `Lapsed`
`RetirementSavingsAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the contact's retirement savings.
`StockValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of public stock the contact owns.
`Website`	**Type** url **Properties** Create, Filter, Nillable, Sort, Update **Description** A website that's associated with the contact.

For more information, see ContactProfile in Education Cloud.

Fundraising Invocable Actions

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

To know more about invocable actions, see Actions Developer Guide and REST API Developer Guide.

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

Manage Custom Gift Commitment Schedules Action
Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records.

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

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

Manage Recurring Gift Commitment Schedule Action
Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record.

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

Pause Gift Commitment Schedule Action
Pauses a gift commitment schedule for a specified period of time.

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

Resume Gift Commitment Schedule Action
Resumes a paused gift commitment schedule on a specified date.

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

Close Gift Commitment Action

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

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

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/closeGiftCommitment`

Formats

JSON

HTTP Methods
POST

Authentication
`Authorization: Bearer token`

Inputs

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

Outputs

None.

Example

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

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

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

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

Manage Custom Gift Commitment Schedules Action

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

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

Supported REST HTTP Methods

URI

`/services/data/v***XX.X***/actions/standard/manageCustomGiftCmtSchds`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer ***token***`

Inputs

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

Outputs

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

Example

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

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

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

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

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

Manage Gift Default Designations Action

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

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

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***token***

Inputs

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

Outputs

None.

Example

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

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

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

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

```
    }
]
```

Manage Gift Transaction Designations Action

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

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

Supported REST HTTP Methods

URI

`/services/data/v`***XX.X***`/actions/standard/manageGiftTrxnDesignations`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***token***

Inputs

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

Outputs

None.

Example

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

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

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

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

Manage Recurring Gift Commitment Schedule Action

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

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

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***token***

Inputs

Input	Details
`effectiveFromDate`	**Type** Date **Description** The date from when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.
`effectiveToDate`	**Type** Date **Description** The date until when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.
`giftCommitmentSchedule`	**Type** sObject **Description** Required. The gift commitment schedule record to be created or updated.

Outputs

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

Example

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

```
{
  "inputs": [
    {
      "effectiveFromDate": "2023-09-25",
      "effectiveToDate": "2023-10-25",
      "giftCommitmentSchedule": {
        "GiftCommitmentId": "6gcNA000000PeKiYAK",
        "TransactionAmount": 100,
        "StartDate": "2023-08-30",
```

```
        "PaymentMethod": "Cheque",
        "Id": "6csNA000000hbxQYAQ"
      }
    }
  ]
}
```

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

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

Process Gift Entries Action

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

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

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`giftEntryId`	**Type** ID

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

Outputs

Output	Details
`donorId`	**Type** ID **Description** The ID of the person, household, or organization account that's associated with the gift entry.
`giftEntryId`	**Type** ID **Description** The ID of the gift entry record that is processed.
`giftProcessingErrorDetails`	**Type** String **Description** The error details when the gift processing status is `Failure`.
`giftProcessingStatus`	**Type** String **Description** The processing status of the gift entry. Valid values are: • `Failure` • `New` • `Success`

Output	Details
`giftTransactionId`	**Type** ID **Description** The ID of the gift transaction that's associated with the gift entry.

Example

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

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

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

```
[
  {
    "actionName": "processGiftEntries",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftProcessingStatus": "SUCCESS",
      "giftEntryId": "6geRM00000000GdYAI",
      "giftTransactionId": "6trRM00000003PJ",
      "giftProcessingErrorDetails": null,
      "donorId": "001RM000005ewDDYAY"
    },
    "version": 1
  }
]
```

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

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

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

```
[
  {
    "actionName": "processGiftEntries",
    "errors": null,
```

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

Pause Gift Commitment Schedule Action

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

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

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***token***

Inputs

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

Input	Details
	Description The date to pause the gift commitment schedule.
`updateReason`	**Type** String **Description** The reason the gift commitment schedule is to be paused.

Outputs

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

Example

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

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

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

```
[
  {
    "actionName": "pauseGiftCommitmentSchedule",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftCommitmentScheduleIdsList": [
        "6csNA000000YNbOYAW",
        "6csNA000000hbxuYAA"
      ]
    },
    "version": 1
```

```
    }
]
```

Process Gift Commitment Action

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

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

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/processGiftCommitment`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

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

Outputs

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

Example

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

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

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

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

Resume Gift Commitment Schedule Action

Resumes a paused gift commitment schedule on a specified date.

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

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/resumeGiftCommitmentSchedule`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`giftCommitmentScheduleId`	**Type** String **Description** Required.

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

Outputs

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

Example

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

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

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

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

```
        ]
      },
      "version": 1
    }
]
```

Update Processed Gift Entries Action

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

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

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/updateProcessedGiftEntries`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`donorId`	**Type** ID **Description** The ID of the account of the donor that is updated when `giftProcessingStatus` is `Success`.
`giftEntryId`	**Type** ID **Description** Required. The ID of the gift entry record to be updated.
`giftProcessingErrorDetails`	**Type** String **Description** The error details when `giftProcessingStatus` is `Failure`.

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

Outputs

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

Example

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

```
{
  "inputs": [
    {
      "donorId": "001RM000005ewDDYAY",
      "giftEntryId": "6geRM00000000GdYAI",
      "giftProcessingErrorDetails": null,
      "giftProcessingStatus": "SUCCESS",
      "giftTransactionId": "6trRM00000003PJ"
    }
  ]
}
```

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

```
[
  {
```

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

Fundraising Metadata API Types

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

For more information about Metadata API and to find a complete reference of existing metadata types, see Metadata API Developer Guide.

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

Flow for Fundraising

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

FlowActionCall

Fundraising exposes additional actionType values for the FlowActionCall Metadata type. For more information on Flow and FlowActionCall metadata type, see Flow.

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Business Rules Engine include: • `closeGiftCommitment`—Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions. This value is available in API version 59.0 and later. • `manageCustomGiftCmtSchds`—Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records. This value is available in API version 59.0 and later. • `manageGiftDefaultDesignations`—Creates and manages Gift Default Designation records for a gift entry associated with a

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

Fundraising Tooling API Objects

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

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

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

FundraisingConfig

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

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unqiue name for FundraisingConfig.
`DonorMatchingMethod`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the method that the gift batch processing uses to automatically select a donor or create one based on the data entered manually or through CSV file upload. Possible values are: • `Duplicate_Management_Rules`—Duplicate Management Rules • `No_Matching`—No Matching The default value is `Duplicate_Management_Rules`.
`FailedTransactionCount`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The count of consecutively failed transactions before the gift commitment status is changed to Failing. If set to 0, the status is never auto-changed to Failing.
`HouseholdSoftCreditRole`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The soft credit role that's assigned to members of the donor's household.
`InstallmentExtDayCount`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The period in number of days before or after an unpaid transaction in a gift commitment is marked as another installment in the gift commitment schedule. The unpaid transaction within the grace period is considered as a gift transaction. Label is New Installment Transaction Status.
`IsHshldSoftCrAutoCrea`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether soft credits are automatically created for household members (`true`) or not (`false`) when the donor donates.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the FundraisingConfig Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico)

Field	Details
	• `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`LapsedUnpaidTrxnCount`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The count of consecutive unpaid transactions before the gift commitment status is changed to Lapsed. If set to 0, the status is never auto-changed to Lapsed.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Label for the FundraisingConfig. In the UI, this field is Application Record Type Configuration.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in

Field	Details
	an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, `NamespacePrefix` is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
`ShouldClosePaidRcrCmt`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether to automatically close a recurring gift commitment when it has no ongoing or future schedule, and no unpaid transaction (`true`) or not (`false`).
`ShouldCreateRcrSchdTrxn`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the next transaction in a recurring schedule is automatically created (`true`) or not (`false`).
`UtmCampaignSrcObj`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The UTM code of the campaign for which the donation was received. This field is available from API version 60.0 and later.
`UtmCampaignSrcObjField`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The UTM code of the campaign for which the donation was received. This field is available from API version 60.0 and later.
`UtmMediumSrcObj`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

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

CHAPTER 5 Program Management

In this chapter ...

- Program Management Standard Objects
- Program Management Business APIs

This guide provides information about the objects and APIs that Program Management uses. You can also find developer resources for features that can be used to extend Program Management.

EDITIONS

Available in: Lightning Experience

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

Program Management Standard Objects

Program Management data model provides objects and fields to manage programs and benefits for your nonprofit organization.

EDITIONS

Available in: Lightning Experience

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

Benefit
Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0 and later.

BenefitAssignment
Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

BenefitDisbursement
Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.

BenefitSchedule
Represents information about the plan for delivering the benefit. This object is available in API version 57.0 and later.

BenefitScheduleAssignment
Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 and later.

BenefitSession
Represents information about an instance of a planned benefit delivery This object is available in API version 57.0 and later.

BenefitType
Represents information about the type of benefits such as Participatory Services available to the program manager. This object is available with Program Management in API version 57.0 and later.

CaseProgram
Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.

Program
Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

ProgramEnrollment
Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

RecurrenceSchedule
For internal use only.

Benefit

Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
`BenefitManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person in charge of the benefit. This field is a relationship field. **Relationship Name** BenefitManager **Relationship Type** Lookup **Refers To** User
`BenefitStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the benefit. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned` The default value is `Active`.
`BenefitTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Specifies the type of the benefit. This field is a relationship field.

Field	Details
	Relationship Name BenefitType **Relationship Type** Master-Detail **Refers To** BenefitType
`BnftDisbFieldSetApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the field set that groups benefit specific fields for the benefit disbursement object.
`CurrentMonthDisbursedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the current month.
`CurrentYearAssignedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits assigned in the current year.
`CurrentYearDisbursedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the current year.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The description of the benefit.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date until when the benefit is valid.
`EnrollmentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of times the benefit is applicable to an individual.
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The goal definition associated with the benefit. This field is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the benefit is active. The default value is false.
`MaximumBenefitAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The maximum amount that can be disbursed for a period.
`MinimumBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum amount that can be disbursed for a period.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit.
`PreviousMonthDisbursedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the previous month.
`PreviousYearAssignedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits assigned in the previous year.
`PreviousYearDisbursedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the previous year.
`ProgramId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the program that's associated with the benefit. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the benefit starts.
`UnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the unit of measure that's used to calculate the benefit. This field is a relationship field. **Relationship Name** Unit **Relationship Type** Lookup **Refers To** UnitOfMeasure

BenefitAssignment

Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Name of the benefit that is associated with the assignment. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date up to when the assignment is valid.
`EnrolleeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Name of the benefit assignee. This field is a polymorphic relationship field. **Relationship Name** Enrollee **Relationship Type** Lookup **Refers To** Account, Contact

Field	Details
`EnrollmentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of times the benefit is applicable to an individual.
`EntitlementAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The benefit amount that an enrollee is eligible for.
`MaximumBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum amount that can be disbursed for a period.
`MinimumBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum amount that can be disbursed for a period.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the benefit assignment.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The parent record associated with the benefit assignment. This field is a polymorphic relationship field. **Relationship Name** ParentRecord **Relationship Type** Lookup **Refers To** CarePlan, GoalAssignment, IndividualApplication, ProgramEnrollment
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the benefit assignment. Possible values are: • `High` • `Low` • `Medium`
`ProgramEnrollmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the program enrollment record that's associated with the benefit assignment. This field is a relationship field.

Field	Details
	Relationship Name ProgramEnrollment **Relationship Type** Lookup **Refers To** ProgramEnrollment
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date from when the assignment begins.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the benefit assignment. Possible values are: • `Active` • `Completed` • `Enrolled` • `Waitlisted` • `Withdrawn` The default value is `Enrolled`.
`TaskJobStatus`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the status of the task in the task queue. Possible values are: • `Completed` • `Failed` • `InProgress - In Progress` • `Submitted`

Field	Details
`TaskJobStatusMessage`	**Type** textarea **Properties** Nillable **Description** The message that describes the status of the task in the queue.
`UnitofMeasureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the unit of measure that's used to calculate the benefit type. This field is a relationship field. **Relationship Name** UnitofMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

BenefitDisbursement

Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
`ActualCompletionDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update

Field	Details
	Description The date when the benefit disbursement was completed.
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the disbursement status of the benefit. Possible values are: • `Approved` • `In Review` • `Not Applicable` • `Pending` • `Rejected`
`BenefitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The benefit assignment that's associated with the disbursement. This field is a relationship field. **Relationship Name** BenefitAssignment **Relationship Type** Master-Detail **Refers To** BenefitAssignment
`BenefitSessionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit session that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. **Relationship Name** BenefitSession

Field	Details
	Relationship Type Lookup **Refers To** BenefitSession
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A description about the benefit that is disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
`DisbursedQuantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The quantity of the benefit that's disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
`DisbursementStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the benefit disbursement. Possible values are: • `Absent` • `Completed` • `Enrolled` • `Excused` The default value is `Enrolled`. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of the benefit period in every payment cycle.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the benefit disbursement.
`ProgramEnrollmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program enrollment record that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. **Relationship Name** ProgramEnrollment **Relationship Type** Lookup **Refers To** ProgramEnrollment
`RecipientCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count of recipients who received the benefit. This field is accessible if you enabled Data Protection and Privacy in Setup.
`RecipientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The participant who receives a benefit. This field is a polymorphic relationship field. **Relationship Name** Recipient **Relationship Type** Lookup

Field	Details
	Refers To Account, Contact
`RecipientType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the recipient type of the benefit that's disbursed. Possible values are: • `Anonymous` • `Program Enrollment` • `Walk-in` The default value is `ProgramEnrollment`. This field is accessible if you enabled Data Protection and Privacy in Setup.
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of the benefit period in every payment cycle.
`UnitOfMeasureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the unit of measure that's used to calculate the benefit type. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. **Relationship Name** UnitOfMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

BenefitSchedule

Represents information about the plan for delivering the benefit. This object is available in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifier of the benefit that's associated with the schedule. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Master-Detail **Refers To** Benefit
`DefaultBenefitQuantity`	**Type** double **Properties** Create, Filter, Sort, Update **Description** The default quantity of benefit that's provided within a session of benefit schedule.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the benefit schedule.

Field	Details
`FirstSessionEndDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the first session ends in the benefit schedule.
`FirstSessionStartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the first session begins in the benefit schedule.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`MaximumParticipantCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The maximum number of participants in a session.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the benefit schedule.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Associated Objects

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

BenefitScheduleFeed
Feed tracking is available for the object.

BenefitScheduleHistory
History is available for tracked fields of the object.

BenefitScheduleAssignment

Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

Fields

Field	Details
`BenefitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The benefit assignment associated with the benefit schedule. This field is a relationship field. **Relationship Name** BenefitAssignment **Relationship Type** Lookup **Refers To** BenefitAssignment
`BenefitScheduleId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The benefit schedule to which benefit participants are being assigned. This field is a relationship field. **Relationship Name** BenefitSchedule **Relationship Type** Master-Detail **Refers To** BenefitSchedule
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the participant's assignment to the benefit schedule.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit schedule assignment.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the participant's assignment to the benefit schedule.

BenefitSession

Represents information about an instance of a planned benefit delivery This object is available in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
`BenefitScheduleId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifier of the benefit schedule that's associated with the benefit session. This field is a relationship field. **Relationship Name** BenefitSchedule **Relationship Type** Master-Detail **Refers To** BenefitSchedule
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The end date and time of the benefit session.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit session.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the benefit session record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The start date and time of the benefit session.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the benefit session. Possible values are: • `Cancelled` • `Completed` • `Postponed` • `Scheduled`

Associated Objects

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

BenefitSessionFeed
Feed tracking is available for the object.

BenefitSessionHistory
History is available for tracked fields of the object.

BenefitType

Represents information about the type of benefits such as Participatory Services available to the program manager. This object is available with Program Management in API version 57.0 and later.

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Required. The category of the benefit type. Picklist values aren't provided for this field and must be added based on the requirements of the organization.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of benefit type.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit type.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`ProcessType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Required. The process type associated with the program management benefit type. Possible value: `Program Management`
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of benefit being offered as part of the program. Possible values are: • `Goods` • `Monetary` • `Service` The default value is `Service`.
`UnitofMeasureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the unit of measure that's used to calculate the benefit type. This field is a relationship field. **Relationship Name** UnitofMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

CaseProgram

Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifer of the case that's associated with the program. This field is a relationship field. **Relationship Name** Case **Relationship Type** Master-Detail **Refers To** Case
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the case program.
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the program that's associated with the case. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`ActiveEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The count of program enrollees in active status. This field is accessible if you enabled Data Protection and Privacy in Setup.
`AdditionalContext`	**Type** textarea **Properties** Create, Nillable, Update **Description** The additional context about the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`CurrentMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current month. This field is accessible if you enabled Data Protection and Privacy in Setup.
`CurrentYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current year. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program ends. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EnrollmentCompletedCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The count of program enrollees in `Completed` status. This field is accessible if you enabled Data Protection and Privacy in Setup.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the program.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The user who owns the object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
ParentProgramId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent program. This field is available from API version 59.0 and later. This field is a relationship field. **Relationship Name** ParentProgram **Relationship Type** Lookup **Refers To** Program
PreviousMonthDisbCount	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous month. This field is accessible if you enabled Data Protection and Privacy in Setup.
PreviousYearDisbCount	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous year. This field is accessible if you enabled Data Protection and Privacy in Setup.
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program begins.
Status	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The status of the program. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned` This field is accessible if you enabled Data Protection and Privacy in Setup.
`Summary`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The summary of the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`TotalEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total enrollee count in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage type of the program. Possible value is: • `ProgramManagement` This field is accessible if you enabled Data Protection and Privacy in Setup.

Associated Objects

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

ProgramFeed
Feed tracking is available for the object.

ProgramHistory
History is available for tracked fields of the object.

ProgramOwnerSharingRule
Sharing rules are available for the object.

ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the account that's associated with an organization enrolled in the program. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ApplicationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date when the enrollee applied to the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the contact that's associated with an individual enrolled in the program. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`CurrentMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed to the enrollee in the current month. This field is accessible if you enabled Data Protection and Privacy in Setup.
`CurrentYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed to the enrollee in the current year. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the enrollment in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the enrollment for the participant in the program is active (`true`) or not (`false`). The default value is `false`. This field is accessible if you enabled Data Protection and Privacy in Setup.
`IsAnonymous`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant enrolled to the program anonymously (`true`) or not (`false`). The default value is `false`. This field is accessible if you enabled Data Protection and Privacy in Setup.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the program enrollment record.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The user who owns the object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PreviousMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed to the enrollee in the previous month. This field is accessible if you enabled Data Protection and Privacy in Setup.
`PreviousYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed to the enrollee in the previous year. This field is accessible if you enabled Data Protection and Privacy in Setup.
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifier of the program that's associated with the enrollee. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup

Field	Details
	Refers To Program
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the enrollment in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The enrollment status of the enrollee for the program. Possible values are: • `Applied` • `Completed` • `Denied` • `In Progress` • `Waitlisted` • `Withdrawn` The default value is `Applied`. This field is accessible if you enabled Data Protection and Privacy in Setup.

Associated Objects

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

ProgramEnrollmentFeed
Feed tracking is available for the object.

ProgramEnrollmentHistory
History is available for tracked fields of the object.

ProgramEnrollmentOwnerSharingRule
Sharing rules are available for the object.

ProgramEnrollmentShare
Sharing is available for the object.

RecurrenceSchedule

For internal use only.

Program Management Business APIs

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

Program Management has these resources.

Resource	Description
`/connect/program-mgmt/programs/${programId}/enrollments`	Enroll participants in a program. An enrollee can either be a contact or an account.
`/connect/program-mgmt/programs/${programId}/enrollments`	Update program enrollments.
`/connect/program-mgmt/benefit-schedules`	Create a preview of the benefit scheduling session.
`/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions`	Create a benefit schedule for a benefit session.
`/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/participants`	Add participants to a benefit schedule.
`/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-sessions/${benefitSessionId}/participants`	Add participants to a benefit session.
`/connect/program-mgmt/benefit/${benefitId}/benefit-disbursements`	Create benefit disbursements for ad hoc walk-in participants.
`/connect/program-mgmt/case-programs/${caseId}`	Create case programs.

EDITIONS

Available in: Lightning Experience

Available in: Program Management is available with Enterprise, Unlimited, and Performance Editions with the Impact Cloud.

REST Reference

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

REST Reference

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

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

Resources
Here's a list of Program Management Business API resources.

Request Bodies
Here's a list of Program Management Business API request bodies.

Response Bodies
Here's a list of Program Management Business API response bodies.

Resources

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

Benefit Disbursements (POST)
Create benefit disbursements for ad hoc walk-in participants.

Benefit Session Participants (POST)
Add participants to a benefit session.

Benefit Schedule Participants (POST)
Asynchronously add participants to a benefit schedule.

Benefit Schedule Participants (DELETE)
Remove participants from a benefit schedule asynchronously.

Benefit Schedule Sessions (POST)
Create a benefit schedule for a benefit session.

Benefit Schedule Sessions Preview (POST)
Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

Benefit Disbursement Field Set API Names
Retrieve the API names of the field sets associated with a benefit disbursement object.

Case Programs (POST)
Create case programs.

Gift Transactions
Get gift transactions associated with a gift commitment record.

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

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

Gift Commitment Default Designations
Get default designations associated with a gift commitment.

Gift Campaign Default Designations
Get default designations associated with a gift campaign.

Program Enrollments (POST)

Enroll participants in a program.

Program Enrollments (PUT)

Update program enrollments.

Benefit Disbursements (POST)

Create benefit disbursements for ad hoc walk-in participants.

Resource

```
/connect/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

Available version

57.0

HTTP methods

POST

Request body for POST

Root XML tag

```
<BenefitDisbursementsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003T1000001U6axIAC"
    ]
  },
  "quantity": 2.5,
  "status": "Enrolled",
  "disbursementDate": "2022-12-18T14:30:00.000"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
disbursementDate	String	The date on which the benefit is disbursed.	Required	57.0
enrollees	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0
quantity	Double	The quantity of the benefit to be disbursed.	Required	57.0

Name	Type	Description	Required or Optional	Available Version
`status`	String	The status of the benefit disbursement.	Required	57.0

Response body for POST

Benefit Disbursements Output

Benefit Session Participants (POST)

Add participants to a benefit session.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-sessions/${benefitSessionId}/participants
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-sessions/${benefitSessionId}/participants
```

Available version

57.0

HTTP methods

POST

Request body for POST

Root XML tag

```
<BenefitSessionParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`enrollees`	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Response body for POST

Benefit Session Participants Output

Benefit Schedule Participants (POST)

Asynchronously add participants to a benefit schedule.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/participants
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/benefit-schedules/${benefitScheduleId}/participants
```

Available version

57.0

HTTP methods

POST

Request body for POST

Root XML tag

```
<BenefitScheduleParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`enrollees`	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Response body for POST

Benefit Schedule Participants Output

Benefit Schedule Participants (DELETE)

Remove participants from a benefit schedule asynchronously.

Removing a participant from a benefit schedule:

- Updates the end date of all the active benefit schedule assignments associated with the participant to a current date.
- Deletes benefit disbursements for future sessions whose attendance is yet to be marked.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-assignments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/program-mgmt/benefit-schedules/BS-00000006/benefit-assignments?ids=BA-00000001,BA-00000002
```

Available version

59.0

HTTP methods

DELETE

Query parameters for DELETE

Parameter Name	Type	Description	Required or Optional	Available Version
`ids`	String[]	Valid IDs of benefit assignments related to the participants to be removed. You can provide a maximum of 100 IDs.	Required	59.0

Benefit Schedule Sessions (POST)

Create a benefit schedule for a benefit session.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions
```

Available version

57.0

HTTP methods

POST

Response body for POST

Generate Benefit Session Output

Benefit Schedule Sessions Preview (POST)

Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

Resource

```
/connect/program-mgmt/benefit-schedules
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/benefit-schedules
```

Available version
57.0

HTTP methods
POST

Request body for POST

Root XML tag
`<PreviewBenefitSessionInputRepresentation>`

JSON example

```
{
  "benefitScheduleName": "Nov Weekday schedule",
  "firstSessionStartDate": "2022-11-14T14:30:00.000",
  "firstSessionEndDate": "2022-11-14T15:00:00.000",
  "scheduleFrequency": "Weekly",
  "scheduleDays": 96,
  "mode": "dryRun",
  "noOfSessions": 5,
  "totalRecurrencesCount": 10
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`benefitScheduleName`	String	The name of the benefit schedule.	Required	57.0
`firstSessionEndDate`	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
`firstSessionStartDate`	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
`mode`	String	The mode of the benefit schedule. The `dryRun` mode indicates that no data is created.	Optional	57.0
`noOfSessions`	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
`scheduleDays`	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
`scheduleEndDate`	String	The date when the benefit schedule ends.	Optional	57.0
`scheduleFrequency`	String	The frequency at which the benefit schedule is executed.	Optional	57.0
`totalRecurrencesCount`	Integer	The number of times the benefit schedule is executed.	Optional	57.0

Response body for POST
Preview Benefit Sessions Output

Benefit Disbursement Field Set API Names

Retrieve the API names of the field sets associated with a benefit disbursement object.

Resource

```
/connect/fieldset/${objectName}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0connect/fieldset/BenefitDisbursement
```

Available version
59.0

HTTP methods
GET

Response body for GET
Field Sets Output

Case Programs (POST)

Create case programs.

Resource

```
/connect/program-mgmt/case-programs/${caseId}
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/case-programs/${caseId}
```

Available version
57.0

HTTP methods
POST

Request body for POST

JSON example

```
{
  "caseProgramRequest": {
    "programIds": [
      "11Wxx0000004F0WEAU",
      "11Wxx0000004F0WEBQ"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
caseProgramRequest	String[]	The list of case programs to be added.	Required	57.0

Response body for POST

Case Programs Output

Gift Transactions

Get gift transactions associated with a gift commitment record.

Resource

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

Resource examples

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/gift-commitments/6gcxx000004WhUIAA0/gift-transactions
```

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/gift-commitments/6gcxx000004WhUIAA0/gift-transactions?count=2&period=Recent&status=Canceled,Failed
```

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/gift-commitments/6gcxx000004WhUIAA0/gift-transactions?count=2&period=Past&fromDate=2023-02-17T13:05:23.000Z
```

Available version

59.0

HTTP methods

GET

Query parameters for GET

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

Parameter Name	Type	Description	Required or Optional	Available Version
		• `Recent` The default period is `Future`.		
`status`	String[]	Comma-separated list of gift-transactions statuses. Possible values are: • `Canceled` • `Failed` • `Fully Refunded` • `Paid` • `Unpaid` • `Written-Off` The default status is `Unpaid`.	Optional	59.0

Response body for GET
Gift Transactions Output

Gift Transaction Designations

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

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

Resource

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

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/transaction/6trRM000000007XYAQ/designations
```

Available version
59.0

HTTP methods
GET

Response body for GET
Gift Transaction Linked Designations Output

Gift Commitment Transactions

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

Resource

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

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/donor/001xx000003GYOpAAO/commitments
```

Available version

59.0

HTTP methods

GET

Response body for GET

Gift Commitment Transaction Matching Output

Gift Commitment Default Designations

Get default designations associated with a gift commitment.

Resource

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

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/commitment/6trRM0000000007XYAQ/default-designations
```

Available version

59.0

HTTP methods

GET

Response body for GET

Gift Commitment Default Designations Output

Gift Campaign Default Designations

Get default designations associated with a gift campaign.

Resource

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

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/fundraising/campaign/701RM000000FhntYAC/default-designations
```

Available version

59.0

HTTP methods

GET

Response body for GET

Gift Campaign Default Designations Output

Program Enrollments (POST)

Enroll participants in a program.

Resource

```
/connect/program-mgmt/programs/${programId}/enrollments
```

Example URI for POST

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments
```

Available version

57.0

HTTP methods

POST

Request body for POST

Root XML tag

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated. For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.	Required	57.0

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      {
        "id": "003xx000004WhxNAAS"
      }
    ]
  }
}
```

Response body for POST

Program Enrollments Output

Program Enrollments (PUT)

Update program enrollments.

Resource

```
/connect/program-mgmt/programs/${programId}/enrollments
```

Example URI for PUT

```
https://yourInstance.salesforce.com/services/data/v60.0/connect
/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments
```

Available version

57.0

HTTP methods

PUT

Request body for PUT

Root XML tag

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`enrollees`	Program Enrollment Input[]	The list of program enrollments that need to be added or updated. For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.	Required	57.0

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      {
        "id": "11Xxx0000004Gz5EAE",
        "status": "Enrolled",
        "endDate": "2025-05-11T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz6EAE",
        "status": "Enrolled",
        "startDate": "2023-02-11T13:05:23.000Z",
        "endDate": "2024-01-12T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz7EAE",
        "status": "Enrolled",
        "startDate": "2023-02-11T13:05:23.000Z",
```

```
        "applicationDate": "2023-02-11T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz9EAE",
        "status": "Enrolled",
        "endDate": "2024-01-11T13:05:23.000Z",
        "applicationDate": "2023-02-12T13:05:23.000Z"
      }
    ]
  }
}
```

Response body for PUT

Program Enrollments Output

Request Bodies

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

Benefit Disbursements Input

Input representation of the request to create benefit disbursements.

Benefit Schedule Participants Input

Input representation of the request to add participants to a benefit schedule.

Benefit Session Participants Input

Input representation of the request to add participants to a benefit session.

Case Programs Input

Input representation of the request to add case programs to a benefit session.

Preview Benefit Session Input

Input representation of the benefit scheduling session preview request.

Program Enrollment Input

Input representation of the enrollee for the program.

Program Enrollments Input

Input representation of the request to enroll or update participants in a program.

Benefit Disbursements Input

Input representation of the request to create benefit disbursements.

Root XML tag

`<BenefitDisbursementsInputRepresentation>`

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003T1000001U6axIAC"
    ]
```

```
  },
  "quantity": 2.5,
  "status": "Enrolled",
  "disbursementDate": "2022-12-18T14:30:00.000"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`disbursementDate`	String	The date on which the benefit is disbursed.	Required	57.0
`enrollees`	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0
`quantity`	Double	The quantity of the benefit to be disbursed.	Required	57.0
`status`	String	The status of the benefit disbursement.	Required	57.0

Benefit Schedule Participants Input

Input representation of the request to add participants to a benefit schedule.

Root XML tag

```
<BenefitScheduleParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`enrollees`	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Benefit Session Participants Input

Input representation of the request to add participants to a benefit session.

Root XML tag

```
<BenefitSessionParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Case Programs Input

Input representation of the request to add case programs to a benefit session.

JSON example

```
{
  "caseProgramRequest": {
    "programIds": [
      "11Wxx0000004F0WEAU",
      "11Wxx0000004F0WEBQ"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
caseProgramRequest	String[]	The list of case programs to be added.	Required	57.0

Preview Benefit Session Input

Input representation of the benefit scheduling session preview request.

Root XML tag

```
<PreviewBenefitSessionInputRepresentation>
```

JSON example

```
{
  "benefitScheduleName": "Nov Weekday schedule",
  "firstSessionStartDate": "2022-11-14T14:30:00.000",
  "firstSessionEndDate": "2022-11-14T15:00:00.000",
  "scheduleFrequency": "Weekly",
  "scheduleDays": 96,
  "mode": "dryRun",
  "noOfSessions": 5,
  "totalRecurrencesCount": 10
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitScheduleName	String	The name of the benefit schedule.	Required	57.0
firstSessionEndDate	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
firstSessionStartDate	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
mode	String	The mode of the benefit schedule. The `dryRun` mode indicates that no data is created.	Optional	57.0
noOfSessions	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
scheduleDays	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
scheduleEndDate	String	The date when the benefit schedule ends.	Optional	57.0
scheduleFrequency	String	The frequency at which the benefit schedule is executed.	Optional	57.0
totalRecurrencesCount	Integer	The number of times the benefit schedule is executed.	Optional	57.0

Program Enrollment Input

Input representation of the enrollee for the program.

Root XML tag

```
<ProgramEnrollmentsDTO>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`applicationDate`	String	The date when the enrollee applied to the program.	Optional	57.0
`endDate`	String	The end date of the enrollment in the program.	Optional	57.0
`id`	String	The ID of the enrollee record. The enrollee can either be a contact or an account.	Required	57.0
`startDate`	String	The start date of the enrollment in the program.	Optional	57.0
`status`	String	The enrollment status of the enrollee for the program.	Optional	57.0

Program Enrollments Input

Input representation of the request to enroll or update participants in a program.

Root XML tag

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`enrollees`	Program Enrollment Input[]	The list of program enrollments that need to be added or updated. For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.	Required	57.0

Response Bodies

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

Benefit Disbursements Output

Output representation of the request to create benefit disbursements.

Benefit Schedule Participants Output

Output representation of the request to add participants to a benefit schedule.

Benefit Session Participants Output

Output representation of the request to add participants to a benefit session.

Benefit Sessions
Output representation of the benefit sessions that are generated for preview.

Case Programs Output
Output representation of the request to add case programs to a benefit session.

Field Sets Output
Output representation of field sets of a benefit disbursement object.

Field Set Output
Output representation of the details of a field set.

Generate Benefit Session Output
Output representation of the request to create a benefit schedule session.

Preview Benefit Sessions Output
Output representation of the benefit scheduling session preview request.

Program Enrollments Output
Output representation of the request to enroll or update participants in a program.

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

Gift Transaction Record Output
Output representation of a gift transaction record.

Gift Transaction Linked Designations Output
Output representation of a list of gift designations.

Gift Designation Record Output
Output representation of a gift designation record.

Gift Commitment Transaction Matching Output
Output representation of a list of gift transactions.

Standard Object Details
Output representation of the details of gift transactions.

Standard Field Details
Output representation of the field attributes in a gift transaction object.

Gift Commitment Default Designation Record Output
Output representation of a default designation record associated with a gift commitment.

Gift Commitment Default Designations Output
Output representation of a list of default designations associated with a gift commitment.

Gift Campaign Default Designation Record Output
Output representation of a default designation record associated with a gift campaign.

Gift Campaign Default Designations Output
Output representation of a list of default designations associated with a gift campaign record.

Benefit Disbursements Output

Output representation of the request to create benefit disbursements.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Benefit Schedule Participants Output

Output representation of the request to add participants to a benefit schedule.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Benefit Session Participants Output

Output representation of the request to add participants to a benefit session.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Benefit Sessions

Output representation of the benefit sessions that are generated for preview.

Property Name	Type	Description	Filter Group and Version	Available Version
`endDate`	String	The end date and time of the benefit session.	Small, 57.0	57.0
`name`	String	The name of the benefit session.	Small, 57.0	57.0
`startDate`	String	The start date and time of the benefit session.	Small, 57.0	57.0

Case Programs Output

Output representation of the request to add case programs to a benefit session.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Field Sets Output

Output representation of field sets of a benefit disbursement object.

JSON example

```
{
  "fieldSets": [
    {
      "description": "FS1",
      "fieldSetApiName": "FS1_API",
      "fieldSetName": "FS1"
    },
    {
      "description": "FS2",
      "fieldSetApiName": "FS2_API",
      "fieldSetName": "FS2"
    },
    {
      "description": "FS3",
      "fieldSetApiName": "FS3_API",
      "fieldSetName": "FS3"
    }
  ],
  "objectName": "BenefitDisbursement"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`fieldSets`	Field Set Output[]	List of field sets of the benefit disbursement object.	Small, 59.0	59.0
`objectName`	String	Name of the benefit disbursement object whose field sets you want to retrieve.	Small, 59.0	59.0

Field Set Output

Output representation of the details of a field set.

Property Name	Type	Description	Filter Group and Version	Available Version
`description`	String	Description of the field set.	Small, 59.0	59.0
`fieldSetApiName`	String	API name of the field set.	Small, 59.0	59.0
`fieldSetName`	String	Name of the field set.	Small, 59.0	59.0

Generate Benefit Session Output

Output representation of the request to create a benefit schedule session.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Preview Benefit Sessions Output

Output representation of the benefit scheduling session preview request.

Property Name	Type	Description	Filter Group and Version	Available Version
`sessions`	Benefit Sessions[]	Specifies the list of the benefit sessions that have been returned for preview.	Small, 57.0	57.0

Program Enrollments Output

Output representation of the request to enroll or update participants in a program.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	The message that provides the request response details.	Small, 57.0	57.0
`success`	Boolean	Indicates whether the request was successful (`true`) or not (`false`).	Small, 57.0	57.0

Gift Transactions Output

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

JSON examples

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

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

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

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

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

Gift Transaction Record Output

Output representation of a gift transaction record.

Property Name	Type	Description	Filter Group and Version	Available Version
`amount`	Double	Transaction amount.	Small, 59.0	59.0
`commitmentId`	String	ID of the gift commitment record.	Small, 59.0	59.0
`commitmentScheduleId`	String	ID of the gift commitment schedule record.	Small, 59.0	59.0
`paymentMethod`	String	Mode of payment for the transaction.	Small, 59.0	59.0
`status`	String	Status of the transaction. This field is not applicable for future transactions.	Small, 59.0	59.0
`transactionDate`	String	Payment due date. This field is applicable only for future transactions.	Small, 59.0	59.0

Gift Transaction Linked Designations Output

Output representation of a list of gift designations.

JSON example

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

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

Gift Designation Record Output

Output representation of a gift designation record.

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

Gift Commitment Transaction Matching Output

Output representation of a list of gift transactions.

JSON example

```
{
   "giftTransactions":[
      {
         "fields":[
            {
               "fieldApiName":"GiftCommitmentId",
               "label":"Gift Commitment ID",
               "type":"String",
               "value":"6gcRM0000004CD0YAM"
            },
            {
               "fieldApiName":"Id",
               "label":"Gift Transaction ID",
               "type":"String",
               "value":"6trRM00000000CwYAI"
            },
            {
               "fieldApiName":"Name",
               "label":"Name",
               "type":"String",
               "value":"Tom C3 - Tom C3 GT 7"
            },
            {
               "fieldApiName":"GiftType",
               "label":"Gift Type",
               "type":"String",
               "value":"Individual"
            },
            {
               "fieldApiName":"TransactionDueDate",
               "label":"Transaction Due Date",
               "type":"DateOnlyWrapper",
               "value":"Thu Aug 31 00:00:00 GMT 2023"
            },
            {
               "fieldApiName":"DonorId",
               "label":"Donor ID",
               "type":"String",
               "value":"001RM000005bZRUYA2"
            },
```

```
            {
               "fieldApiName":"OwnerId",
               "label":"Owner ID",
               "type":"String",
               "value":"005RM0000027gL8YAI"
            },
            {
               "fieldApiName":"RefundedAmount",
               "label":"Refunded Amount",
               "type":"Double",
               "value":"0.0"
            },
            {
               "fieldApiName":"Status",
               "label":"Status",
               "type":"String",
               "value":"Unpaid"
            },
            {
               "fieldApiName":"IsDeleted",
               "label":"Deleted",
               "type":"Boolean",
               "value":"false"
            },
            {
               "fieldApiName":"IsPartiallyRefunded",
               "label":"Partially Refunded",
               "type":"Boolean",
               "value":"false"
            },
            {
               "fieldApiName":"CurrentAmount",
               "label":"Current Amount",
               "type":"Double",
               "value":"2.2222222E7"
            },
            {
               "fieldApiName":"AcknowledgementStatus",
               "label":"Acknowledgement Status",
               "type":"String",
               "value":"To Be Sent"
            },
            {
               "fieldApiName":"OriginalAmount",
               "label":"Original Amount",
               "type":"Double",
               "value":"2.2222222E7"
            },
            {
               "fieldApiName":"IsWrittenOff",
               "label":"Written Off",
               "type":"Boolean",
               "value":"false"
            },
```

```
            {
               "fieldApiName":"IsFullyRefunded",
               "label":"Fully Refunded",
               "type":"Boolean",
               "value":"false"
            },
            {
               "fieldApiName":"PaymentMethod",
               "label":"Payment Method",
               "type":"String",
               "value":"Cash"
            },
            {
               "fieldApiName":"IsPaid",
               "label":"Paid",
               "type":"Boolean",
               "value":"false"
            }
         ],
         "objectApiName":"GiftTransaction"
      },
      {
         "fields":[
            {
               "fieldApiName":"GiftCommitmentId",
               "label":"Gift Commitment ID",
               "type":"String",
               "value":"6gcRM0000004CD0YAM"
            },
            {
               "fieldApiName":"Id",
               "label":"Gift Transaction ID",
               "type":"String",
               "value":"6trRM00000000CxYAI"
            },
            {
               "fieldApiName":"Name",
               "label":"Name",
               "type":"String",
               "value":"Tom C3 - Tom C3 GT 6"
            },
            {
               "fieldApiName":"GiftType",
               "label":"Gift Type",
               "type":"String",
               "value":"Individual"
            },
            {
               "fieldApiName":"TransactionDueDate",
               "label":"Transaction Due Date",
               "type":"DateOnlyWrapper",
               "value":"Wed Aug 30 00:00:00 GMT 2023"
            },
            {
```

```
            "fieldApiName":"DonorId",
            "label":"Donor ID",
            "type":"String",
            "value":"001RM000005bZRUYA2"
         },
         {
            "fieldApiName":"OwnerId",
            "label":"Owner ID",
            "type":"String",
            "value":"005RM0000027gL8YAI"
         },
         {
            "fieldApiName":"RefundedAmount",
            "label":"Refunded Amount",
            "type":"Double",
            "value":"0.0"
         },
         {
            "fieldApiName":"Status",
            "label":"Status",
            "type":"String",
            "value":"Unpaid"
         },
         {
            "fieldApiName":"IsDeleted",
            "label":"Deleted",
            "type":"Boolean",
            "value":"false"
         },
         {
            "fieldApiName":"IsPartiallyRefunded",
            "label":"Partially Refunded",
            "type":"Boolean",
            "value":"false"
         },
         {
            "fieldApiName":"CurrentAmount",
            "label":"Current Amount",
            "type":"Double",
            "value":"11111.0"
         },
         {
            "fieldApiName":"AcknowledgementStatus",
            "label":"Acknowledgement Status",
            "type":"String",
            "value":"To Be Sent"
         },
         {
            "fieldApiName":"OriginalAmount",
            "label":"Original Amount",
            "type":"Double",
            "value":"11111.0"
         },
         {
```

```
                "fieldApiName":"IsWrittenOff",
                "label":"Written Off",
                "type":"Boolean",
                "value":"false"
            },
            {
                "fieldApiName":"IsFullyRefunded",
                "label":"Fully Refunded",
                "type":"Boolean",
                "value":"false"
            },
            {
                "fieldApiName":"PaymentMethod",
                "label":"Payment Method",
                "type":"String",
                "value":"Cash"
            },
            {
                "fieldApiName":"IsPaid",
                "label":"Paid",
                "type":"Boolean",
                "value":"false"
            }
        ],
        "objectApiName":"GiftTransaction"
    }
  ]
}
```


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

Standard Object Details

Output representation of the details of gift transactions.

Property Name	Type	Description	Filter Group and Version	Available Version
`fields`	Standard Field Details[]	List of gift transaction fields.	Small, 59.0	59.0
`objectApiName`	String	API name of the gift transaction.	Small, 59.0	59.0

Standard Field Details

Output representation of the field attributes in a gift transaction object.

Property Name	Type	Description	Filter Group and Version	Available Version
`fieldApiName`	String	API name of a field in the gift transaction object.	Small, 59.0	59.0
`label`	String	Label of a field in the gift transaction object.	Small, 59.0	59.0
`type`	String	Type of a field in the gift transaction object.	Small, 59.0	59.0
`value`	String	Value of a field in the gift transaction object.	Small, 59.0	59.0

Gift Commitment Default Designation Record Output

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

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

Gift Commitment Default Designations Output

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

JSON example

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

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

Gift Campaign Default Designation Record Output

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

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

Gift Campaign Default Designations Output

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

JSON example

```
{
   "campaignDefaultDesignations":[
      {
         "designationId":"6mdRM000000000LYAQ",
         "percent":100
      },
      {
         "designationId":"6gkxx000004WhULAA0",
         "percent":50
      }
   ]
}
```

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

CHAPTER 6 Outcome Management Standard Objects

In this chapter ...

- ImpactStrategy
- ImpactStrategyAssignment
- IndicatorAssignment
- IndicatorDefinition
- IndicatorPerformancePeriod
- IndicatorResult
- Outcome
- OutcomeActivity
- TimePeriod
- UnitOfMeasure

The Outcome Management data model provides objects and fields to define, measure, and evaluate an organization's outcome strategy.

ImpactStrategy

Represents a high-level strategy to affect change in an individual, population, stakeholder, or the environment. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the impact strategy.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this impact strategy.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this impact strategy.
`Level`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the level or scope of the impact strategy. Possible values are: • `Department` • `Organizational` • `Program`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the impact strategy.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the impact strategy. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentImpactStrategyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent impact strategy. This field is a relationship field. **Relationship Name** ParentImpactStrategy **Relationship Type** Lookup

Field	Details
	Refers To ImpactStrategy
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the impact strategy. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the impact strategy. Possible values are: • `External Requirement` • `Logic Model` • `Strategic Plan` • `Theory of Change`

Associated Objects

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

ImpactStrategyFeed
Feed tracking is available for the object.

ImpactStrategyHistory
History is available for tracked fields of the object.

ImpactStrategyOwnerSharingRule
Sharing rules are available for the object.

ImpactStrategyShare
Sharing is available for the object.

ImpactStrategyAssignment

Represents the connection between the impact strategy and the outcome or other object related to the impact strategy. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
`ImpactStrategyId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The impact strategy associated with this impact strategy assignment. This field is a relationship field. **Relationship Name** ImpactStrategy **Relationship Type** Lookup **Refers To** ImpactStrategy
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this impact strategy assignment.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** Date and time when a user last viewed this impact strategy assignment.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The unique number of the impact strategy assignment.
`OutcomeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The outcome associated with this impact strategy assignment. This field is a relationship field. **Relationship Name** Outcome **Relationship Type** Lookup **Refers To** Outcome

Associated Objects

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

ImpactStrategyAssignmentFeed
Feed tracking is available for the object.

ImpactStrategyAssignmentHistory
History is available for tracked fields of the object.

IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
`IndicatorAssignmentType`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the object that the indicator assignment measures. Possible values are: • `Outcome` • `Program`
`IndicatorDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The indicator definition that's associated with the indicator assignment. This field is a relationship field. **Relationship Name** IndicatorDefinition **Relationship Type** Lookup **Refers To** IndicatorDefinition
`IntendedDirection`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition. Possible values are: • `Decrease` • `Increase` • `Maintain`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this indicator assignment.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator assignment.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator assignment.
`OutcomeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outcome that the indicator assignment measures. This field is a relationship field. **Relationship Name** Outcome

Field	Details
	Relationship Type Lookup **Refers To** Outcome
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that the indicator assignment measures. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the indicator assignment. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`

Associated Objects

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

IndicatorAssignmentFeed
Feed tracking is available for the object.

IndicatorAssignmentHistory
History is available for tracked fields of the object.

IndicatorDefinition

Represents information about the indicator assignment and the process of measuring and calculating the indicator results. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator definition.
`FlowDefinitionApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this indicator definition.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator definition.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator definition.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the outcome. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the indicator definition. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`

Field	Details
`UnitOfMeasureId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The unit of measure for the target, baseline, and result values that are associated with this indicator definition. This field is a relationship field. **Relationship Name** UnitOfMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

Associated Objects

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

IndicatorDefinitionFeed
Feed tracking is available for the object.

IndicatorDefinitionHistory
History is available for tracked fields of the object.

IndicatorDefinitionOwnerSharingRule
Sharing rules are available for the object.

IndicatorDefinitionShare
Sharing is available for the object.

IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
`BaselineDescription`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the baseline value.
`BaselineValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the indicator assignment at the beginning of the indicator performance period.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator performance period.
`IndicatorAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The indicator assignment that is associated with the indicator performance period. This field is a relationship field. **Relationship Name** IndicatorAssignment **Relationship Type** Lookup

Field	Details
	Refers To IndicatorAssignment
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this indicator performance period.
`LastResultMeasurementDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date when the last result value was measured. This field is a calculated field.
`LastResultValue`	**Type** double **Properties** Filter, Nillable, Sort **Description** The result value from the most recently measured indicator result. This field is a calculated field.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator performance period.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator performance period.

Field	Details
`TargetProgress`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the progress of the target within the time period. Possible values are: • `At Risk` • `Complete` • `Not Met` • `Not Started` • `On Track`
`TargetValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The target value of the indicator assignment within the time period.
`TimePeriodId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The time period that is associated with the indicator performance period. This field is a relationship field. **Relationship Name** TimePeriod **Relationship Type** Lookup **Refers To** TimePeriod

Associated Objects

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

IndicatorPerformancePeriodFeed
Feed tracking is available for the object.

IndicatorPerformancePeriodHistory
History is available for tracked fields of the object.

IndicatorResult

Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
`CalculationMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Determines whether the indicator result was added manually or calculated by automation. This field is available from API version 60.0 and later. Possible values are: • `AutomaticallyCalculated` • `Manual`
`Denominator`	**Type** double **Properties** Create, Filter, Nillable, Sort **Description** The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator result.
`FlowDefinitionApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The API name of the flow definition associated with this indicator result. This field is available from API version 60.0 and later.
`FlowVersion`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort **Description** The version of the flow that calculated this result. This field is available from API version 60.0 and later.
`IndicatorPerformancePeriodId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The indicator performance period for which the result is defined. This field is a relationship field. **Relationship Name** IndicatorPerformancePeriod **Relationship Type** Lookup **Refers To** IndicatorPerformancePeriod
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description Date and time when a user last referenced this indicator result.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator result.
`MeasurementDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date on which the indicator result is measured.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the indicator result.
`Numerator`	**Type** double **Properties** Create, Filter, Nillable, Sort **Description** The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
`ResultValue`	**Type** double **Properties** Create, Filter, Sort, Update **Description** The result for the indicator performance period.
`Type`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the result for the time period. Possible values are: • `Final` • `Interim`

Associated Objects

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

IndicatorResultFeed
Feed tracking is available for the object.

IndicatorResultHistory
History is available for tracked fields of the object.

Outcome

Represents information about the expected change in participants that is driven by the organization's activity. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The description of the outcome.
`IntendedDirection`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the outcome. Possible values are: • `Decrease` • `Increase` • `Maintain`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this outcome.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this outcome.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the outcome.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the user who owns the outcome. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SourceName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the outcome. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`
`Term`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the term for which the outcome is defined. Possible values are: • `Long-Term` • `Medium-Term` • `Short-Term`

Associated Objects

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

OutcomeFeed
Feed tracking is available for the object.

OutcomeHistory
History is available for tracked fields of the object.

OutcomeOwnerSharingRule
Sharing rules are available for the object.

OutcomeShare
Sharing is available for the object.

OutcomeActivity

Represents a junction between Outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit that's associated with the outcome. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup

Field	Details
	Refers To Benefit
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The goal definition that's associated with the outcome. This field is available from API version 60.0 and later. This field is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this outcome activity.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this outcome activity.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the outcome activity.
`OutcomeActivityType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The type of activity that's associated with the outcome, such as program, benefit. Possible values are: • `Benefit` • `Goal Definition` This value is available from API version 60.0 and later. • `Program`
`OutcomeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The outcome that's associated with the outcome activity. This field is a relationship field. **Relationship Name** Outcome **Relationship Type** Lookup **Refers To** Outcome
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that's associated with the outcome. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program

Associated Objects

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

OutcomeActivityFeed
Feed tracking is available for the object.

OutcomeActivityHistory
History is available for tracked fields of the object.

TimePeriod

Represents the time period that's used to calculate the indicator performance and result. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
`EndDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The end date and time of the time period.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this time period.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this time period.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the time period.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the time period. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`StartDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The start date and time of the time period.

Associated Objects

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

TimePeriodFeed
Feed tracking is available for the object.

TimePeriodHistory
History is available for tracked fields of the object.

TimePeriodOwnerSharingRule
Sharing rules are available for the object.

TimePeriodShare
Sharing is available for the object.

UnitOfMeasure

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of this unit of measure.
`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
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this unit of measure.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
Type	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The type of the unit of measure. For example, weight, distance, period.
UnitCode	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The code for this unit of measure. For example, mm[Hg], mcg/mL., kgs, lbs.

Associated Objects

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

UnitOfMeasureChangeEvent (API version 59.0)
Change events are available for the object.

UnitOfMeasureOwnerSharingRule
Sharing rules are available for the object.

UnitOfMeasureShare
Sharing is available for the object.

CHAPTER 7 Grantmaking

In this chapter ...

- Grantmaking Object Reference
- Grantmaking Tooling API Object
- Grantmaking Metadata API Types

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

EDITIONS

Available in: Lightning Experience

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

Grantmaking Object Reference

The Grantmaking data model provides objects and fields to calculate and manage grants for your organization.

EDITIONS

Available in: Lightning Experience

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

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

ApplicationDecision
Represents a final decision performed for the specified Application. This object is available in API version 56.0 and later.

ApplicationReview
Represents a review performed against a specified Application. This object is available in API version 56.0 and later.

ApplicationTimeline
Represents the milestone dates in the application process. This object is available in API version 57.0 and later.

Budget
Tracks an estimate of future revenue or expenses during a specific time period. This object is available in API version 53.0 and later.

BudgetAllocation
Represents a subsection of a Budget that shows where allocated resources are being applied. This object is available in API version 53.0 and later.

BudgetCategory
Represents information about the purpose of the budget that's used in understanding and reporting of budget. This object is available in API version 57.0 and later.

BudgetCategoryValue
Captures budget values for category and time period. This object is available in API version 57.0 and later.

BudgetParticipant
Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

BudgetPeriod
Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.

FundingAward
Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. This object is available in API version 57.0 and later.

FundingAwardAmendment
Represents a modification to the scope or finances of a previously approved award. This object is available in API version 57.0 and later.

FundingAwardParticipant
Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 and later.

FundingAwardRequirement
Represents a deliverable or milestone that is needed for the award to either be approved or closed. This object is available in API version 57.0 and later.

FundingDisbursement

Represents a payment that has been made or scheduled to be made to a funding recipient. This object is available in API version 57.0 and later.

FundingOpportunity

The pool of money available for distribution for a specific purpose. This object is available in API version 57.0 and later.

FundingOppParticipant

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 and later.

IndividualApplication

Represents an application form submitted by an individual. This object is available in API version 50.0 and later.

IndividualAppInParticipant

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.

PreliminaryApplicationRef

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

ApplicationDecision

Represents a final decision performed for the specified Application. This object is available in API version 56.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
`ApplicationDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision for the application. Possible values are:

Field	Details
	• `Award` • `Deny`
`ApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the application. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** IndividualApplication
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the decision provided on the application.
`DecisionAuthorityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user responsible for the application decision. This field is a relationship field. **Relationship Name** DecisionAuthority **Relationship Type** Lookup **Refers To** User
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the preliminary application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PreliminaryApplicationRefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the preliminary application reference. This field is a relationship field.

Field	Details
	Relationship Name PreliminaryApplicationRef **Relationship Type** Lookup **Refers To** PreliminaryApplicationRef

ApplicationReview

Represents a review performed against a specified Application. This object is available in API version 56.0 and later.

Represents a review performed against a specified Application.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
`ApplicationCategory`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Specifies the category of the application based on the decision period. Possible values are: • `Basic` • `Special`
`ApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The individual application associated with the application review. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** IndividualApplication
`ApplicationRecommendation`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the reviewer's recommended outcome of the application. Possible values are: • `Ask for Revisions` • `Award` • `Deny`
`AssignedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application was assigned to the reviewer.
`AssignedUserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies the user assigned to perform the review. This field is a relationship field. **Relationship Name** AssignedUser **Relationship Type** Lookup

Field	Details
	Refers To User
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the review provided on the application.
`Condition`	**Type** textarea **Properties** Create, Nillable, Update **Description** The condition that's applicable to an applicant.
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date by which the application review should be completed.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application review was completed.
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application review has been submitted. This field is available from API version 58.0 and later. The default value is `true`.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the application being reviewed.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner associated with this application review. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ReviewedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who reviewed the application.

Field	Details
	This field is a relationship field. **Relationship Name** ReviewedBy **Relationship Type** Lookup **Refers To** User
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application review started.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the application review. Possible values are: • `Cancelled` • `Completed` • `In Progress` • `Not Started`
`SubmissionDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date when the applicant submitted the application.
`Title`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The detailed name of the preliminary application reference.

Associated Objects

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

ApplicationReviewFeed
Feed tracking is available for the object.

ApplicationReviewHistory
History is available for tracked fields of the object.

ApplicationReviewOwnerSharingRule
Sharing rules are available for the object.

ApplicationReviewShare
Sharing is available for the object.

ApplicationTimeline

Represents the milestone dates in the application process. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
`ApplicationCloseDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date when applicants can apply for a grant.
`ApplicationOpenDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when applicants can start to apply for a grant.

Field	Details
DecisionReleaseDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application decision is announced.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the application timeline being reviewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies which feature this application timeline record belongs to. Possible values are: • `Grantmaking`

Budget

Tracks an estimate of future revenue or expenses during a specific time period. This object is available in API version 53.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the budget. This field is available from API version 58.0 and later. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of funds for a budget shown in currency format.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the budget and its related business processes.
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the budget has been submitted. This field is available from API version 58.0 and later. The default value is `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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description Name of the budget.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentBudgetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the associated parent budget. This field is available from API version 56.0 and later. This field is a relationship field. **Relationship Name** ParentBudget **Relationship Type** Lookup **Refers To** Budget
`PeriodEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end of the date range for which the budget applies.
`PeriodName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the time period to which the budget applies.
`PeriodStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The beginning of the date range for which the budget applies.
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program associated with the budget. This field is available from API version 58.0 and later. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`Quantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The quantity used to track a budget for non-currency projects. For example, this could be number of hours or number of resources.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the budget.

Field	Details
	Possible values are: • `Active` • `Archived` • `Planned`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Categorizes the budget by how it will be used. Possible values are: • `Department` • `Program` • `Project`

Associated Objects

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

BudgetFeed
Feed tracking is available for the object.

BudgetHistory
History is available for tracked fields of the object.

BudgetOwnerSharingRule
Sharing rules are available for the object.

BudgetShare
Sharing is available for the object.

BudgetAllocation

Represents a subsection of a Budget that shows where allocated resources are being applied. This object is available in API version 53.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of allocated funds.
`BudgetCategoryValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The budget category value that's associated with the grants allocation. This field is a relationship field. **Relationship Name** BudgetCategoryValue **Relationship Type** Lookup **Refers To** BudgetCategoryValue
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The budget that this allocation is related to. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget

Field	Details
FundingDisbursementId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The funding disbursement associated with the budget allocation. This field is available from API version 58.0 and later. This field is a relationship field. **Relationship Name** FundingDisbursement **Relationship Type** Lookup **Refers To** FundingDisbursement
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** A descriptive name for the allocation.
Quantity	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total quantity amount allocated for non-currency projects.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the budget allocation. Possible values are: • `Allocated` • `Committed` • `Finalized`

Associated Objects

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

BudgetAllocationFeed
Feed tracking is available for the object.

BudgetAllocationHistory
History is available for tracked fields of the object.

BudgetCategory

Represents information about the purpose of the budget that's used in understanding and reporting of budget. This object is available in API version 57.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent budget that's associated with the budget category. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the budget category.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the budget category.
`Reason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason why an item is being included in the budget.
`SequenceNumber`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The number assigned to a budget category that's used to edit or show a category.

Associated Objects

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

BudgetCategoryFeed
Feed tracking is available for the object.

BudgetCategoryHistory
History is available for tracked fields of the object.

BudgetCategoryValue

Captures budget values for category and time period. This object is available in API version 57.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount of the budget that was used. This field is available from API version 59.0 and later.
`ActualQuantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual quantity of the budget that was used. This field is available from API version 59.0 and later.
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The planned amount for the budget.
`BudgetCategoryId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID that's associated with this budget category value. This field is a relationship field. **Relationship Name** BudgetCategory **Relationship Type** Master-Detail **Refers To** BudgetCategory
`BudgetDivisionId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The budget period that's associated with the budget category value. This field is a relationship field. **Relationship Name** BudgetDivision **Relationship Type** Lookup **Refers To** BudgetPeriod
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about how the budget was used. This field is available from API version 59.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name for the values of this budget category.

Field	Details
`Quantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The planned quantity for the budget. Used to when establishing budgets for non-currency projects.
`VarianceAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The amount over or under the planned budget that was used. This field is available from API version 59.0 and later. This field is a calculated field.
`VarianceQuantity`	**Type** double **Properties** Filter, Nillable, Sort **Description** The quantity over or under the planned budget that was used. This field is available from API version 59.0 and later. This field is a calculated field.

Associated Objects

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

BudgetCategoryValueFeed
Feed tracking is available for the object.

BudgetCategoryValueHistory
History is available for tracked fields of the object.

BudgetParticipant

Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The budget associated with the budget participant. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the budget.
`IsParticipantActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the budget participant is currently active (`true`) or not (`false`).

Field	Details
	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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the budget participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the budget. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The participant role associated with the budget participant. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

BudgetParticipantFeed
Feed tracking is available for the object.

BudgetParticipantHistory
History is available for tracked fields of the object.

BudgetPeriod

Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`BudgetId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The parent budget that's associated with the budget period. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the budget has been submitted. This field is available from API version 59.0 and later. The default value is `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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the budget period.

Field	Details
`PeriodEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the budget period ends.
`PeriodStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the budget period.
`SequenceNumber`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The order in which the budget period is shown.

Associated Objects

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

BudgetPeriodFeed
Feed tracking is available for the object.

BudgetPeriodHistory
History is available for tracked fields of the object.

FundingAward

Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total award amount.
`AwardNumber`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** The unique identifier of the funding award in the customer's org.
`AwardeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The entity related to the funding award. The account can be an organization or individual that receives the funding. This field is a relationship field. **Relationship Name** Awardee **Relationship Type** Lookup **Refers To** Account
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The budget that's used to track the use of the award funding.

Field	Details
	This field is a relationship field. **Relationship Name** Budget **Relationship Type** Lookup **Refers To** Budget
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual receiving the funding award. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`ContractId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract associated with the funding award. This field is available from API version 59.0 and later. This field is a relationship field. **Relationship Name** Contract **Relationship Type** Lookup **Refers To** Contract
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The currency ISO code for this individual application participant. This field is hidden when multicurrency is off. This field is available from API version 59.0 and later. Possible values are: • `AUD`—Australian Dollar • `EUR`—Euro • `PEN`—Peruvian Sol • `USD`—U.S. Dollar The default value is `USD`.
`DecisionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time of the decision about the funding award.
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the contract related to the award ends.
`FundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The funding opportunity that's associated with the award. This field is a relationship field. **Relationship Name** FundingOpportunity **Relationship Type** Lookup **Refers To** FundingOpportunity

Field	Details
IndividualApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual application that's related to the award. This field is a relationship field. **Relationship Name** IndividualApplication **Relationship Type** Lookup **Refers To** IndividualApplication
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding award.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentFundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent funding award for this amendment. This field is a relationship field. **Relationship Name** ParentFundingAward **Relationship Type** Lookup **Refers To** FundingAward
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program associated with the funding award. This field is available from API version 58.0 and later. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date and time when the contract related to the award begins.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the current status of the award. Possible values are: • `Active` • `Cancelled` • `Completed`

Associated Objects

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

FundingAwardFeed
Feed tracking is available for the object.

FundingAwardHistory
History is available for tracked fields of the object.

FundingAwardOwnerSharingRule
Sharing rules are available for the object.

FundingAwardShare
Sharing is available for the object.

FundingAwardAmendment

Represents a modification to the scope or finances of a previously approved award. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`AdjustedAwardAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount that's approved for adjustment in the funding award amount.
`AdjustedEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date of adjustment to the end date of the funding award.
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the requested adjustment. Possible values are: • `Approved` • `In Review` • `New` • `Rejected`
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** The comment about the approval or rejection of the adjustment request.
`ContractId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The amended contract related to this funding award amendment.

Field	Details
	This field is available from API version 59.0 and later. This field is a relationship field. **Relationship Name** Contract **Relationship Type** Lookup **Refers To** Contract
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The currency ISO code for this individual application participant. This field is hidden when multicurrency is off. This field is available from API version 59.0 and later. Possible values are: • `AUD`—Australian Dollar • `EUR`—Euro • `PEN`—Peruvian Sol • `USD`—U.S. Dollar The default value is `USD`.
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award that's associated with the contract that's adjusted. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`IsSubmitted`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the amendment to the funding award has been submitted (`true`) or not (`false`). This field is available from API version 58.0 and later. 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of amendment for the funding award.
`ProposedAwardAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of adjustment requested in the award amount.
`ProposedEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The requested change to the End Date of the funding award.
`Reason`	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason for the adjustment requested in the contract.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the adjustment request. Possible values are: • `Approved` • `Draft` • `Rejected` • `Submitted`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of adjustment. Possible values are: • `Administrative` • `Amount` • `Scope` • `Timeline`

Associated Objects

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

FundingAwardAmendmentFeed
Feed tracking is available for the object.

FundingAwardAmendmentHistory
History is available for tracked fields of the object.

FundingAwardParticipant

Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the funding award.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The currency ISO code for this funding award participant. This field is hidden when multicurrency is off. Possible values are: • `AUD`—Australian Dollar • `EUR`—Euro • `PEN`—Peruvian Sol • `USD`—U.S. Dollar The default value is `USD`.

Field	Details
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award associated with the funding award participant. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`IsParticipantActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the funding award participant is currently active (`true`) or not (`false`). 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The name of the funding award participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the funding award. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the funding award participant. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

FundingAwardParticipantFeed
Feed tracking is available for the object.

FundingAwardParticipantHistory
History is available for tracked fields of the object.

FundingAwardRequirement

Represents a deliverable or milestone that is needed for the award to either be approved or closed. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status the information that's submitted against the requirements. Possible values are: • `Approved` • `In Review` • `New` • `Rejected`
`AssignedContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the person who is responsible for submitting the requirement. This field is a relationship field. **Relationship Name** AssignedContact **Relationship Type** Lookup **Refers To** Contact

Field	Details
AssignedUserId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who submits the funding requirement. This field is a relationship field. **Relationship Name** AssignedUser **Relationship Type** Lookup **Refers To** User
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the funding requirement.
DueDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The last date and time of submitting the requirement.
FundingAwardId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award that's associated with the funding requirement. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward

Field	Details
`FundingDisbursementId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The funding disbursement that's associated with the requirement. The funds are disbursed only after the requirements are fulfilled. This field is a relationship field. **Relationship Name** FundingDisbursement **Relationship Type** Lookup **Refers To** FundingDisbursement
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the requirement for the funding award has been submitted (`true`) or not (`false`). This field is available from API version 58.0 and later. 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.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding requirement.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the funding requirement. Possible values are: • `Approved` • `Delayed` • `In Progress` • `Open` • `Rejected` • `Submitted`
`SubmittedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time when the requirement was submitted.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of funding requirement. Possible values are: • `Combined Report` • `Contract` • `Financial Report` • `Narrative Report`

Associated Objects

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

FundingAwardRequirementFeed
Feed tracking is available for the object.

FundingAwardRequirementHistory
History is available for tracked fields of the object.

FundingDisbursement

Represents a payment that has been made or scheduled to be made to a funding recipient. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount that's disbursed to the awardee.
`DisbursementDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time of funds disbursement.
`FundingAwardId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The funding award that's associated with the funding disbursement. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`IsApproved`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the funding disbursement is approved (true) or not (false). The default value is `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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**

Field	Details
`PaymentMethodType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the payment method for funds disbursement. Possible values are: • `Cash` • `Check` • `EFT` • `Wire`
`PaymentNumber`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** The unique identifier of the payment related to the funds disbursement.
`ScheduledDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The scheduled date and time to disburse the funds.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the funds disbursement. Possible values are: • `Approved` • `Cancelled` • `Paid` • `Pending Approval` • `Processing` • `Returned` • `Scheduled`

Associated Objects

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

FundingDisbursementFeed
Feed tracking is available for the object.

FundingDisbursementHistory
History is available for tracked fields of the object.

FundingOpportunity

The pool of money available for distribution for a specific purpose. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`ApplicationInstructions`	**Type** textarea **Properties** Create, Nillable, Update **Description** The instructions on how to apply for the funding opportunity.
`ApplicationTimelineId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The application timeline associated with the opportunity that describes the milestones in the application process. This field is a relationship field. **Relationship Name** ApplicationTimeline

Field	Details
	Relationship Type Lookup **Refers To** ApplicationTimeline
`BudgetTemplateId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The budget that's used as a template by the applicants when they apply for the funding opportunity. This field is a relationship field. **Relationship Name** BudgetTemplate **Relationship Type** Lookup **Refers To** Budget
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The currency ISO code for this individual application participant. This field is hidden when multicurrency is off. This field is available from API version 59.0 and later. Possible values are: • `AUD`—Australian Dollar • `EUR`—Euro • `PEN`—Peruvian Sol • `USD`—U.S. Dollar The default value is `USD`.
`Description`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The description about the opportunity in terms of the minimum award requirements and expected outcome.
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the acceptance of funding opportunity applications ended.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`MaximumFundingAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum fund amount that's awarded.
`MinimumFundingAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum fund amount that's awarded.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding opportunity.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record.s This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentFundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent funding opportunity. This field is available from API version 59.0 and later. This field is a relationship field. **Relationship Name** ParentFundingOpportunity **Relationship Type** Lookup **Refers To** FundingOpportunity
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program associated with the funding opportunity.

Field	Details
	This field is available from API version 58.0 and later. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the acceptance of funding opportunity applications started.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the funding opportunity. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned`

Associated Objects

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

FundingOpportunityFeed
Feed tracking is available for the object.

FundingOpportunityHistory
History is available for tracked fields of the object.

FundingOpportunityOwnerSharingRule
Sharing rules are available for the object.

FundingOpportunityShare
Sharing is available for the object.

FundingOppParticipant

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the funding opportunity.
`FundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding opportunity associated with the funding opportunity participant. This field is a relationship field. **Relationship Name** FundingOpportunity **Relationship Type** Master-Detail **Refers To** FundingOpportunity
`IsParticipantActive`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the funding opportunity participant is currently active (`true`) or not (`false`). 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the funding opportunity participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the funding opportunity. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the funding opportunity participant. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

FundingOppParticipantFeed
Feed tracking is available for the object.

FundingOppParticipantHistory
History is available for tracked fields of the object.

IndividualApplication

Represents an application form submitted by an individual. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The ID of the applicant's account. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AmountPaid`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount paid by the applicant.
`ApplicationCaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a case that relates to this application. This is a relationship field. **Relationship Name** ApplicationCase **Relationship Type** Lookup **Refers To** Case
`ApplicationCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Categorizes the ways an application can be processed. Possible values are: • `Basic` • `Special`

Field	Details
`ApplicationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Descriptive name for the application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available from API version 57.0 and later.
`ApplicationReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The custom reference number assigned to the application. This field is available if you enabled Health Cloud, Public Sector Solutions, or Grantmaking in Setup.
`ApplicationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the application. Possible values are: • `Change of Location` • `Change of Ownership` • `New Salon`
`AppliedDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The date on which the application was received from the applicant.
`ApprovedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the application was approved.

Field	Details
`BenefitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit assignment associated with the individual application. This field is a relationship field. **Relationship Name** BenefitAssignment **Relationship Type** Lookup **Refers To** BenefitAssignment
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit associated with the individual application. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The budget associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available from API version 57.0 and later. This field is a relationship field. **Relationship Name** Budget

Field	Details
	Relationship Type Lookup **Refers To** Budget
`BusinessTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of individual business activity for this application. This is a relationship field. **Relationship Name** BusinessType **Relationship Type** Lookup **Refers To** BusinessType
`Category`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The service category of the application. Possible values are: • `License` • `Permit`
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim with which the individual application is associated. Available in API version 59.0 and later. This field is a relationship field. **Relationship Name** Claim

Field	Details
	Relationship Type Lookup **Refers To** Claim
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the individual application. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text description provided by the applicant.
`FundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The funding opportunity associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later. This field is a relationship field. **Relationship Name** FundingOpportunity **Relationship Type** Lookup **Refers To** FundingOpportunity

Field	Details
FundingRequestPurpose	**Type** textarea **Properties** Create, Nillable, Update **Description** Description of what the individual application funds are used for. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later.
InternalStatus	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the individual application in Salesforce CRM. Available in API version 57.0 and later.
IsOwnerEditable	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether the owner ID of this record can be changed. The default value is 'false'.
IsSubmitted	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual application has been submitted. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 58.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
LicensePermitNameId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The emergency service authorization that will be granted if this application is approved. This is a relationship field. **Relationship Name** LicensePermitName **Relationship Type** Lookup **Refers To** BusinessLicense
LicenseTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of emergency service that the applicant will provide. This is a relationship field. **Relationship Name** LicenseType **Relationship Type** Lookup **Refers To** RegulatoryAuthorizationType
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The auto-generated unique ID for this application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user that owns this record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time at which payment was received from the applicant.
`RecordTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record associated to the application. This is a relationship field. **Relationship Name** RecordType **Relationship Type** Lookup **Refers To** RecordType
`RequestedAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Amount requested in the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later.
`RequirementsCompleteDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the applicant fulfilled all the requirements for approval.
`SavedApplicationRefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference Id of the saved application. This is a relationship field. **Relationship Name** SavedApplicationRef **Relationship Type** Lookup **Refers To** PreliminaryApplicationRef
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The submission and approval status of the application. Possible values are: • `Approved and Issued` • `Declined` • `In Review` • `Returned` • `Submitted`

Field	Details
	• `Verification Phase`
`WasReturned`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether a submitted application was sent back to the applicant due to errors. The default value is 'false'.

Associated Objects

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

IndividualApplicationChangeEvent (API Version 55.0)
Change events are available for the object.

IndividualApplicationFeed
Feed tracking is available for the object.

IndividualApplicationHistory
History is available for tracked fields of the object.

IndividualApplicationOwnerSharingRule
Sharing rules are available for the object.

IndividualApplicationShare
Sharing is available for the object.

IndividualApplnParticipant

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the individual application.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The currency ISO code for this individual application participant. This field is hidden when multicurrency is off. Possible values are: • `AUD`—Australian Dollar • `EUR`—Euro • `PEN`—Peruvian Sol • `USD`—U.S. Dollar The default value is `USD`.
`IndividualApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The individual application associated with the individual application participant. This field is a relationship field. **Relationship Name** IndividualApplication **Relationship Type** Lookup **Refers To** IndividualApplication
`IsParticipantActive`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual application participant is currently active (`true`) or not (`false`). 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the individual application participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the individual application. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the individual application participant. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

IndividualApplnParticipantFeed
Feed tracking is available for the object.

IndividualApplnParticipantHistory
History is available for tracked fields of the object.

PreliminaryApplicationRef

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the applicant for the application. This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup **Refers To** Contact
`ApplicationCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category of the application
`ApplicationName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the preliminary application.
`ApplicationType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Type of application. Possible values are: • `BusinessLicenseApplication`—Business License Application • `BusinessPrescreening`—License Requirement Assessment • `IndividualApplication`—Individual Application

Field	Details
`BusinessAccountNameId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the account related to the application. This field is a relationship field. **Relationship Name** BusinessAccountName **Relationship Type** Lookup **Refers To** Account
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application was submitted. 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Name of the preliminary application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SavedApplicationUrl`	**Type** url **Properties** Create, Filter, Group, Sort, Update **Description** Relative path of the saved application.
`SubmissionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application was submitted.

Associated Objects

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

PreliminaryApplicationRefFeed
Feed tracking is available for the object.

PreliminaryApplicationRefHistory
History is available for tracked fields of the object.

PreliminaryApplicationRefOwnerSharingRule
Sharing rules are available for the object.

PreliminaryApplicationRefShare
Sharing is available for the object.

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`ActiveEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of program enrollees in active status. This field is accessible if you enabled Data Protection and Privacy in Setup.
`AdditionalContext`	**Type** textarea **Properties** Create, Nillable, Update **Description** The additional context about the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`CurrentMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current month. This field is accessible if you enabled Data Protection and Privacy in Setup.
`CurrentYearDisbCount`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current year. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program ends. This field is accessible if you enabled Data Protection and Privacy in Setup.
`EnrollmentCompletedCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of program enrollees in `Completed` status. This field is accessible if you enabled Data Protection and Privacy in Setup.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the program.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The user who owns the object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent program. This field is available from API version 59.0 and later. This field is a relationship field. **Relationship Name** ParentProgram **Relationship Type** Lookup **Refers To** Program
`PreviousMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous month. This field is accessible if you enabled Data Protection and Privacy in Setup.

Field	Details
`PreviousYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous year. This field is accessible if you enabled Data Protection and Privacy in Setup.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program begins.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the program. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned` This field is accessible if you enabled Data Protection and Privacy in Setup.
`Summary`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The summary of the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`TotalEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total enrollee count in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage type of the program. Possible value is: • `ProgramManagement` This field is accessible if you enabled Data Protection and Privacy in Setup.

Associated Objects

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

ProgramFeed
Feed tracking is available for the object.

ProgramHistory
History is available for tracked fields of the object.

ProgramOwnerSharingRule
Sharing rules are available for the object.

Grantmaking Tooling API Object

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

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

ApplicationRecordTypeConfig
Represents the configuration that maps object record types to an application. This object is available in API version 57.0 and later.

EDITIONS

Available in: Lightning Experience

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

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

ApplicationRecordTypeConfig

Represents the configuration that maps object record types to an application. 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`

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
`ApplicationUsageType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Count of application records used by Grantmaking. Possible values are: • `BA`—Benefit Assistance • `CCM`—Composable Case Management • `EDU`—Education Cloud • `Grantmaking` • `HC`—Health Cloud • `ERM`—Others • `LPI`—Public Sector Solutions
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unqiue name for ApplicationRecordTypeConfig. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

Field	Details
	In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**. This field is automatically generated, but you can supply your own value if you create the record using the API. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance may slow while Salesforce generates one for each record.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the ApplicationRecordTypeConfig. Possible values are: • The language of the account record type configuration. • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Label for the ApplicationRecordTypeConfig. In the UI, this field is Application Record Type Configuration.
`ObjectName`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Objects used by Grantmaking. Possible values are: • `IndividualApplication`—Individual Application
`RecordTypeName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of record type that was created for Individual Application.

Grantmaking Metadata API Types

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

Find a complete reference of existing metadata types, see Metadata API Developer Guide.

IndustriesSettings
Represents the settings for Grantmaking

IndustriesSettings

Represents the settings for Grantmaking

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

In the package manifest, all organization settings metadata types are accessed using the Settings name.

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

Industries settings for Grantmaking are available in API version 59.0 and later.

Special Access Rules

Unless noted otherwise, these settings are available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Industries settings for Grantmaking are available in API version 59.0 and later.

Field Name	Field Type	Description
`enableCompliantDataSharingForBudget`	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Budget object. The default is `false`. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
`enableCompliantDataSharingForIndividualApplication`	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Individual Application object. The default is `false`. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
`enableCompliantDataSharingForFundingAward`	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Funding Award object. The default is `false`. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
`enableGrantmaking`	boolean	Indicates whether the Grantmaking feature is enabled. The default is `false`. This option can't be disabled (`false`) once it's enabled (`true`). Only requires that the Grantmaking license is enabled in the org.

Declarative Metadata Sample Definition

The following is an example of an Industries.Settings metadata file.

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

<enableCompliantDataSharingForIndividualApplication>true</enableCompliantDataSharingForIndividualApplication>


<enableCompliantDataSharingForFundingAward>true</enableCompliantDataSharingForFundingAward>
</IndustriesSettings>
```

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

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

```
        <members>Industries</members>
        <name>Settings</name>
    </types>
    <version>54.0</version>
</Package>
```

CHAPTER 8 NonProfit Cloud Associated Objects

In this chapter ...

- StandardObjectName__Share
- StandardObjectName__OwnerSharingRule
- StandardObjectName__History
- StandardObjectName__ChangeEvent
- StandardObjectName__Feed

This section provides a list of objects associated to Nonprofit Cloud standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see System Fields in the *Object Reference for Salesforce and Lightning Platform*.

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

*StandardObjectName*Share

*StandardObjectName*Share 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 *StandardObjectName*Share 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`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The level of access allowed. Values are: • `All` (owner) • `Edit` (read/write) • `Read` (read only)
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the parent record.
`RowCause`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort

Field Name	Details
	Description Reason that the sharing entry exists.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that has been given access to the object.

*StandardObjectName*OwnerSharingRule

*StandardObjectName*OwnerSharingRule 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 *StandardObjectName*OwnerSharingRule syntax. For example, ChannelProgramOwnerSharingRule is a rule for sharing a channel program with users other than the channel program owner. We list the available associated owner sharing rule objects at the end of this topic. For specific version information, see the standard object documentation.

Note: To enable access to this object, contact Salesforce customer support. But we recommend that you use Metadata API to programmatically update owner sharing rules instead because it triggers automatic sharing rule recalculation. The SharingRules Metadata API type is enabled for all orgs.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for ChannelProgramOwnerSharingRule, see the special access rules for ChannelProgram.

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description Determines the level of access users have to records. Values are: • `Read` (read only) • `Edit` (read/write)
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of the sharing rule. Maximum length is 1000 characters.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package, and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance can slow while Salesforce generates one for each record.
`GroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.

Field Name	Details
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that you are granting access to.

*StandardObjectName*History

*StandardObjectName*History 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 *StandardObjectName*History 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
StandardObjectName`Id`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the standard object.
`DataType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Data type of the field that was changed.

Field Name	Details
`Field`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Name of the field that was changed.
`NewValue`	**Type** anyType **Properties** Nillable, Sort **Description** New value of the field that was changed.
`OldValue`	**Type** anyType **Properties** Nillable, Sort **Description** Old value of the field that was changed.

*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

- Not all objects may be available in your org. Some objects require specific feature settings and permissions to be enabled.
- For more special access rules, if any, see the documentation for the standard object. For example, for AccountChangeEvent, see the special access rules for Account.

Change Event Name

Change events are available for all custom objects and a subset of standard objects. The name of a change event is based on the name of the corresponding object for which it captures the changes.

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: `AccountChangeEvent`

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: `MyCustomObject__ChangeEvent`

Change Event Fields

The fields that a change event can include correspond to the fields on the associated parent Salesforce object, with a few exceptions. For example, AccountChangeEvent fields correspond to the fields on Account.

The fields that a change event doesn't include are:

- The `IsDeleted` system field.
- The `SystemModStamp` system field.
- Any field whose value isn't on the record and is derived from another record or from a formula, except roll-up summary fields, which are included. Examples are formula fields. Examples of fields with derived values include `LastActivityDate` and `PhotoUrl`.

Each change event also contains header fields. The header fields are included inside the `ChangeEventHeader` field. They contain information about the event, such as whether the change was an update or delete and the name of the object, like Account.

In addition to the event payload, the event schema ID is included in the `schema` field. Also included is the event-specific field, `replayId`, which is used for retrieving past events.

Event Message Example

The following example is an event message in JSON format for a new account record creation.

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
```

```
    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedById": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedById": "<User_ID>"
  },
  "event": {
    "replayId": 6
  }
}
```

API Version and Schema

When you subscribe to change events, the subscription uses the latest API version and the event messages received reflect the latest field definitions. For more information, see API Version and Event Schema in the *Change Data Capture Developer Guide*.

Usage

For more information about Change Data Capture, see Change Data Capture Developer Guide.

*StandardObjectName*Feed

*StandardObjectName*Feed 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 *StandardObjectName*Feed 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 on the parent object, like Account for AccountFeed
- Moderate Chatter

  Note: Users with the Moderate Chatter permission can delete only the feed items and comments they can see.

  Only users with this permission can delete items in unlisted groups.

For more special access rules, if any, see the documentation for the standard object. For example, for AccountFeed, see the special access rules for Account.

Fields

Field	Details
`BestCommentId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the comment marked as best answer on a question post.
`Body`	**Type** textarea **Properties** Nillable, Sort **Description** The body of the post. Required when `Type` is `TextPost`. Optional when `Type` is `ContentPost` or `LinkPost`.
`CommentCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of comments associated with this feed item.
`ConnectionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** When a PartnerNetworkConnection modifies a record that is tracked, the `CreatedBy` field contains the ID of the system administrator. The `ConnectionId` contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
`InsertedById`	**Type** reference **Properties** Group, Nillable, Sort

Field	Details
	Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the `InsertedBy` value is set to the `ID` of the context user.
`isRichText`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the feed item `Body` contains rich text. If you post a rich text feed comment using SOAP API, set `IsRichText` to `true` and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • `<p>` Tip: Though the ` ` tag isn't supported, you can use `<p> </p>` to create lines. • `<a>` • `<b>` • `<code>` • `<i>` • `<u>` • `<s>` • `<ul>` • `<ol>` • `<li>` • `<img>` The `<img>` tag is accessible only through the API and must reference files in Salesforce similar to this example: `<img src="sfdc://069B0000000omjh"></img>`
`LikeCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of likes associated with this feed item.
`LinkUrl`	**Type** url

Field	Details
	Properties Nillable, Sort **Description** The URL of a `LinkPost`.
`NetworkScope`	**Type** picklist **Properties** Group, Nillable, Restricted picklist, Sort **Description** Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org. `NetworkScope` can have the following values: • `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. Note the following exceptions for `NetworkScope`: • 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`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the record that is tracked in the feed. The detail page for the record displays the feed.
`RelatedRecordId`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the ContentVersion record associated with a `ContentPost`. This field is null for all posts except `ContentPost`.
`Title`	**Type** string

Field	Details
	Properties Group, Nillable, Sort **Description** The title of the feed item. When the `Type` is `LinkPost`, the `LinkUrl` is the URL and this field is the link name.
`Type`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of feed item: • `ActivityEvent`—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. • `AdvancedTextPost`—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • `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. • `RypplePost`—generated when a user creates a Thanks badge in WDC. • `TextPost`—a direct text entry on a feed.

Field	Details
	• `TrackedChange`—a change or group of changes to a tracked field. • `UserStatus`—automatically generated when a user adds a post. Deprecated. The following values appear in the `Type` picklist for all feed objects but apply only to CaseFeed: • `CaseCommentPost`—generated event when a user adds a case comment for a case object • `EmailMessageEvent`—generated event when an email related to a case object is sent or received • `CallLogPost`—generated event when a user logs a call for a case through the user interface. CTI calls also generate this event. • `ChangeStatusPost`—generated event when a user changes the status of a case • `AttachArticleEvent`—generated event when a user attaches an article to a case Note: If you set `Type` to `ContentPost`, also specify `ContentData` and `ContentFileName`.
`Visibility`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **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. `Visibility` can have the following values: • `AllUsers`—The feed item is available to all users who have permission to see the feed item. • `InternalUsers`—The feed item is available to internal users only. Note the following exceptions for `Visibility`: • For record posts, `Visibility` is set to `InternalUsers` for all internal users by default. • External users can set `Visibility` only to `AllUsers`. • On user and group posts, only internal users can set `Visibility` to `InternalUsers`.

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.