



Salesforce for Communications

Communications Data Model Specification, May 2016

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V4.0



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1.0 About this Document

This document describes a common data model including entities and relationship among these that may be used in integrating at a logical data layer an ecosystem around the Salesforce platform in support of key customer relationship management (CRM) business processes in the communications industry. The content herein is suitable for the following audience personas:

- Enterprise architects
- Systems integration professionals
- Applications and systems developers
- Business and domain experts involved in enterprise-wide business applications deployments
- Business professionals responsible for defining and managing customer-facing applications

The data model described here is aligned with the Shared Data Model (SID) specification by TM Forum Framework 15.0 to the extent that is relevant for a CRM system to fully support known industry business processes today, but also business processes of the future brought about by the emergence of next-generation services, networks, and technologies. Particular attention is dedicated to business processes in support of customer experience in the context of a digital lifestyle, fast spreading within the increasingly connected digital world:

- Concept-to-launch: covering concept design to commercial products, services, promotions and campaigns launch through a sales Omni-channel (Mobile, Web, Store, and Contact Center)
- Quote-to-cash: covering the process of pricing, product configuration and quoting to order capture
- Cash-to-care: covering the process of customer experience and value assurance, including issue resolution and financial management

Although the CRM system is at the forefront of delivering these processes from a customer's perspective, there are other systems fulfilling key aspects of the overall business processes. The data model is designed to enable a seamlessly integrated data layer between the underlying systems, including but not limited to product catalog, billing, order management, CPQ, ERP, and analytics.



2.0 Definitions

	Concept	Definition
1	Account	An entity representing a customer or any other party consuming products and services
2	AccountContactRelationship	Relationship between accounts and contact (e.g., one contact may have multiple accounts)
3	Asset	Groups of products, resources, services or combination thereof assigned to an account or a user in an account as a result of a commercial agreement. Assets are governed by various policies around usage, ownership, distribution etc.
4	AssetLineItem	Atomic representation of an asset, associated with other assets
5	Balance	A running aggregation (tally or count) of charges and credits based on currency or non-currency resources
6	BalanceAggregation	A collection of different types of balances such as currency and entitlements (e.g., USD, Minutes, Frequent Flier Miles etc.)
7	Bill	Aggregation of itemized charges and credits
8	BillDocument	Presentation of bill information through various media to a requester, usually a customer
9	BillItem	Aggregation of charges and credits
10	BillingProfile	Specification of billing preferences, payment method, and dunning rules for a specific customer
11	Case	Represents a customer issue or problem related to customer accounts, assets, bills, services etc.
12	Charge	Monetary or non-monetary price required for delivery of goods and/or services
13	Contact	Information about a customer (or an account owner) and methods by which the customer / account owner may be reached contextually
14	Contract	Business agreement between two parties
15	ContractLineItem	Specific breakdown of the contract based on acquired asset line items and/or policies governing the asset line items
16	Dunning	Debt collection process usually initiated when customers do not meet contractual payment obligations



17	DunningSpecification	A class definition of common attributes about Dunning/Collections
18	Inventory	A complete list of physical and logical products and resources
19	Location	Describes details about a customer premises
20	Order	A request to procure products, services and resources
21	OrderItem	Specific breakdown of the order based on account, product, resources and service attributes
22	Opportunity	A qualified lead that will potentially place an order
23	OpportunityLineItem	Individual lines items representing various characteristics of the opportunity
24	Payment	A transaction involving transfer of value between two parties
25	PaymentMethod	The method of used to make a payment
26	PaymentPlan	An agreement to make payments against a debt or purchase of goods and services (e.g., installment)
27	Premises	Describes the details of a customer premises where services, assets, orders etc. are delivered, maintained, and fulfilled, respectively
28	PriceBook2	A listing of products
29	PriceBookEntry	Describes the relationship between PriceBook2 and Product2
30	Product2	A class definition of tangible commercial entities that may be purchased, subscribed to or used by customers or other parties
31	ProductAttribute	Key/value pair describing a characteristic of a product (e.g., Color/Pink for a device)
32	ProductRelationship	Describes the relationship between simple and bundled products in case a simple product is part of a bundle
33	Quote	A price estimate (quote) or a presentation for sale (offer) of product offerings to a customer or prospect.
34	QuoteLineItem	Specific breakdown of the quote per product, resource or service
35	Resource	A class definition of logical and physical resources that may be purchased, subscribed to or used by customers or other parties as part of acquiring a commercial offer
36	ResourceAttribute	Key/value pair describing a characteristic of a resource (e.g., Size/10GB for a storage resource)



37	ResourceRelationship	Describes the relationship between resources (e.g., simple and bundled/composite resources)
38	Service	A class definition of technical capabilities that may be purchased, subscribed to or used by customers or other parties as a result of acquiring a commercial offer
39	ServiceAttribute	Key/value pair describing a characteristic of a service (e.g., Quality of Service [QoS] for a video service with a value of HD)
40	ServiceRelationship	Describes the relationship between services (e.g., simple and bundled/composite services)
41	Shipment	Describes shipping information related to customer order
42	WorkOrder	An internal (i.e., service-provider-facing) representation of the customer order to aid in tracking, distribution and fulfillment of order activities
43	WorkOrderItem	A breakdown of the work order based on individual order activities and/or fulfillment steps, including systems and organizations

3.0 Introduction

Salesforce, the leading customer engagement platform, integrates within an ecosystem with a number of other industry-relevant applications in fulfilling business processes such as Concept-to-Cash-to-Care. The integration of other systems to the Salesforce ecosystems, typically involves a variety of choices in terms of data models, messaging, and overall integration approaches. This diversity poses a challenge to customers. Maintaining and migrating to future releases to leverage new features and functions are among those challenges as a result of the many custom integrations. Salesforce, in order to simplify and to make uniform the ecosystem integration process, is introducing a common data model, aligned with TM Forum Shared Information Model (SID), for the communications industry. This approach enables not only a streamlined integration to the Salesforce platform, but also standardized communication among all participants in the ecosystem. No longer will it be required to build one-to-many applications integrations by each independent software vendor (ISV) partner in a given ecosystem. When all applications in the ecosystem share a common standards-based data model, then the integration becomes a simple fact of subscribing to relevant services in the ecosystem. The customer may readily migrate to future releases of various application, resting assured, that the data model will inherently support the migration because of the abstraction on top of the single data model that all participants are using.

4.0 Standards Framework

The Salesforce common integration model is aligned with the TM Forum Framework. TM Forum is a global, non-profit industry association and standards body serving enterprises – service providers as well as suppliers – in the communications, media and entertainment industries. It focuses on simplifying business processes and operations through knowledge transfer, collaboration and standards. Salesforce as a leading proponent of business process and business environment simplification is aligned in terms of its strategic vision for the industries that it serves with the main deliverables of TM Forum. Since TM Forum's Framework is an integrated business architecture for rationalizing and simplifying IT, business processes, systems, and operations, it lends itself well as the basis of alignment for the Salesforce industries common integration architecture. The TM Forum Framework as a suite of standards and best practices is composed of four primary components: business process framework, information framework, application framework, and integration framework. The components of Framework will be discussed next.

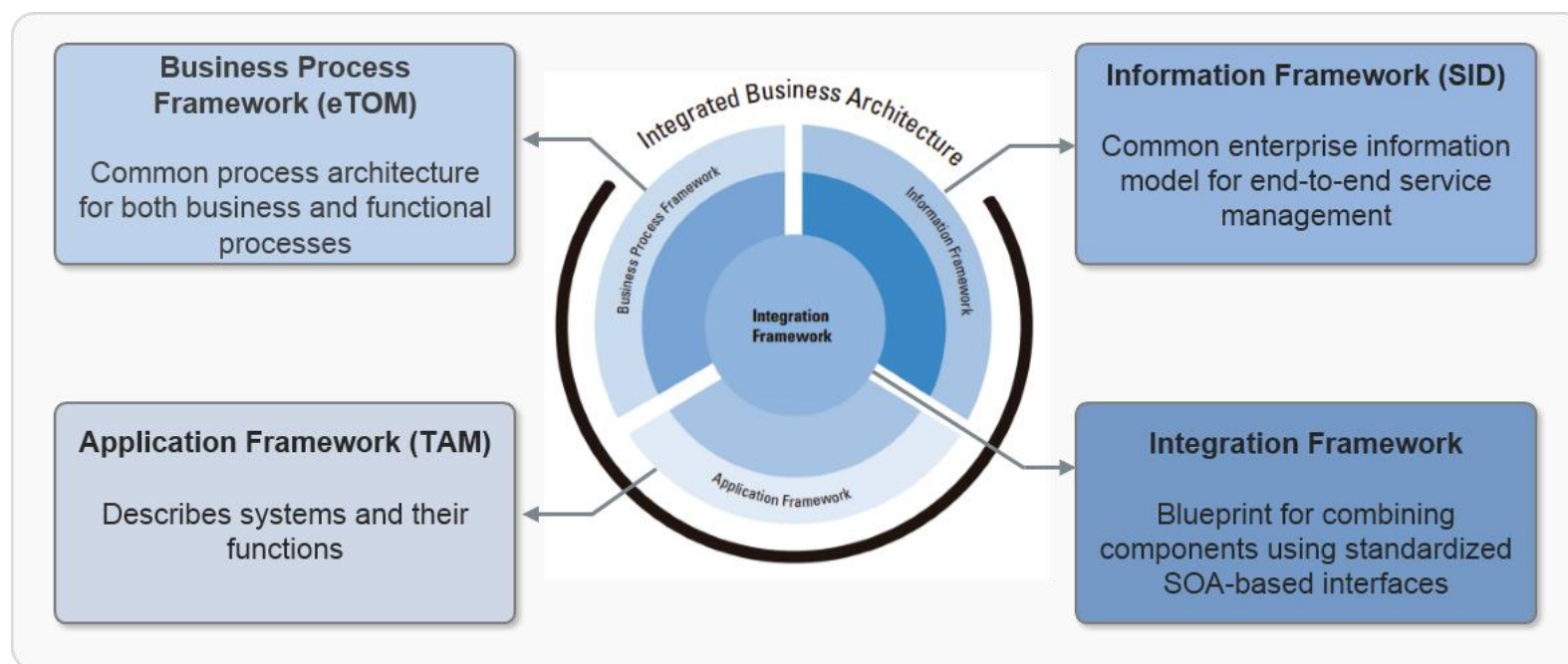


Figure 1. TM Forum Framework



4.1 Business Process Framework

The business process framework, also referred to as the enhanced telecommunications operational map (eTOM), is a business process architecture that identifies and organizes the functions that an enterprise performs on an on-going basis. It serves as a blueprint of processes that the business performs to achieve its goals and objectives. The eTOM establishes a common language to describe the functions and processes of the business in a consistent way.

4.2 Application Framework

The application framework, also known as the telecommunications applications map (TAM), defines the applications that represent collections of closely related business functions and information comprising application services and functions. It enables enterprises to deploy modular yet seamlessly integrated sets of applications.

4.3 Integration Framework

The integration Framework, also known as the Technology Neutral Architecture (TNA), defines how to use Frameworkx to design, architect and implement an enterprise. It provides direction on how operational processes can be automated by utilizing standardized information definitions from the Information Framework to define standardized, reusable Service Oriented Architecture (SOA)-based Business Services. The Integration Framework provides an automated means to create standardized interfaces and use these interfaces to integrate applications within the enterprise and with partners.

4.4 Information Framework

The Information Framework, also referred to as the Shared Informational and Data model (SID), provides a common information architecture and nomenclature. It does so in the form of a comprehensive model of information/data definitions, relationships, and patterns that describe the information assets enterprises manage. The SID describes information from a business perspective. The model is therefore independent of both technology and implementation. This feature allows SID to serve as an information blueprint that can be used across businesses and is specifically intended to be extensible, specialized, and evolved into specific implementations that meet specific industry requirements. The



organization and content of SID are based on comprehensive modeling of both business information (data) and business processes across many enterprises and thus, is well suited as basis for a superset cross-industry canonical data modeling.

5.0 Objectives

The Salesforce industries common integration architecture delivers on the following objectives in terms of specific deliverables:

Objective	Deliverable
A canonical object model to serve as a robust foundation layer for unifying all integration approaches to the Salesforce platform	Data model specification aligned with TM Forum Shared Information Data Model (SID)
A standard-based framework for business process-level integrations	Specification of industry-specific business processes, aggregate business entities and operations
A standardized framework for integration types, interaction between Salesforce and other systems, migration approached and utilities	Guidelines and best practice recommendations to facilitate much simpler and streamlined B/OSS deployments as a new way forward
Using and extending existing Salesforce object model as an accelerator toward innovating standards-based integration products	Mapping between current Salesforce objects and new objects in the canonical model
Governance of productized integrations, data model extensions and interactions with the Salesforce platform	Governance model established collaboratively with partners and customers to ensure multi-layered interoperability in a Salesforce-supported ecosystem

6.0 Data Model Specification

The data model described in this section is developed in support of the Concept-to-Cash-to-Care (C3) business process for the telecommunications industry. The data model is an additive overlay on the existing standard Salesforce data model. The overlay data model for communications, the subject of this document, uses and extends certain key Salesforce standard objects such as Account, Assets,

Order, and Product among others, but also defines new objects such as Balance, Bill, Dunning, Service, etc. in order to comprehensively support the C3 business process between all applications, including Salesforce-native and Salesforce-external, in a B/OSS integrated environment around the Salesforce platform. The main objective for the data model is to ensure that data exchange between ISV vendors in a Salesforce-integrated ecosystem is abstracted from customers and to enable them to innovate unimpeded without the presence of any limitations in the underlying integration infrastructure.

The data model is defined with the C3 business process in focus. The C3 business process is fulfilled by several capability domains, each mastering its own specialty data. For example, the detailed billing data will be mastered in the billing system and will not be statically maintained in Salesforce. An appropriate information container – billing-related in this example – is defined within Salesforce and thus in the data model herein to query on-demand the billing domain for relevant information for the fulfillment of the C3 process from a customer experience perspective. This example extends to the role of and interactions with other capability domains in the ecosystem such as CPQ, EPC, Order Management, and ERP among others.

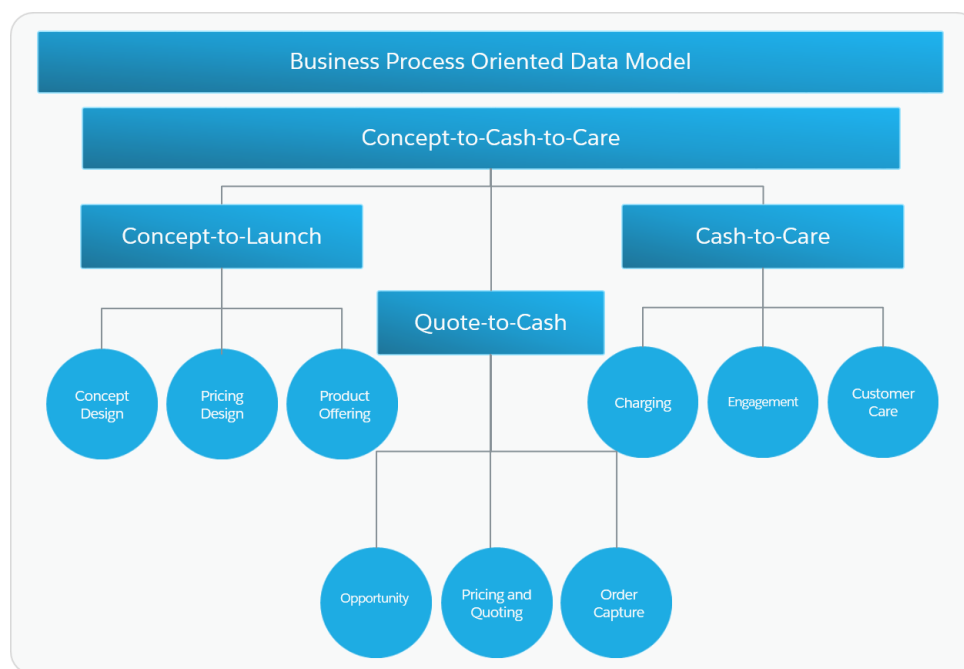


Figure 2. C3 process used for the definition of the Salesforce communications data model

6.1 Sample Communications Enterprise Systems Layout

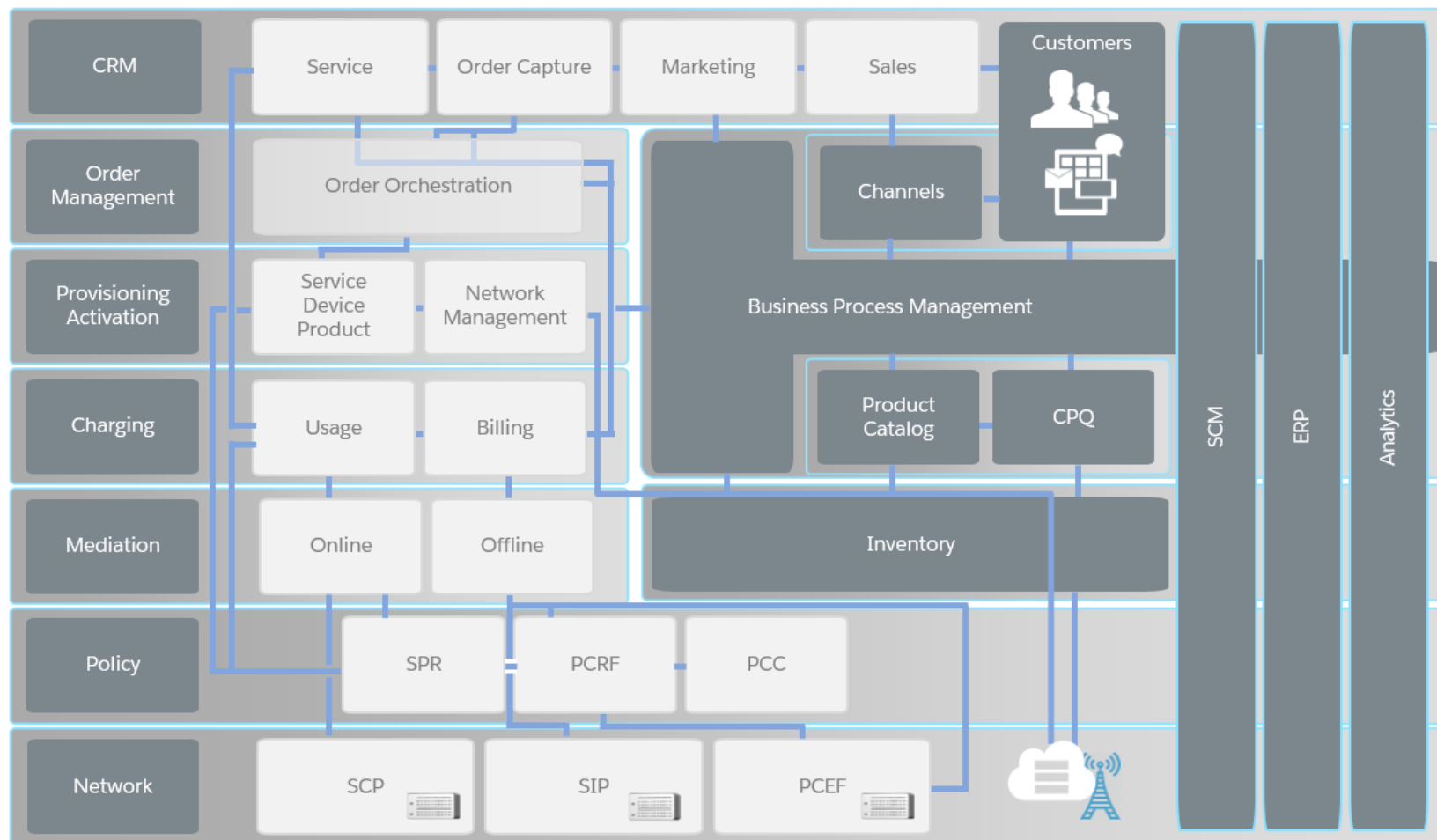


Figure 3. Top view of a communications enterprise systems and interactions enabling the Concept-to-Cash business process

6.2 Communications Enterprise Data Domains

	System	Domain	Data Ownership	Potential Overlap
1	CRM	<ul style="list-style-type: none"> Customer Customer Order Contract Sales & Marketing Customer Service / Problem Case Management Customer Insight 	<ul style="list-style-type: none"> Customer Opportunity Quote Order Asset Case 	<p>Quote may potentially be mastered in CPQ</p> <p>Asset includes instances of customer product, customer resource, and customer service</p>
2	Order Management	<ul style="list-style-type: none"> Order Decomposition Order Orchestration 		
3	CPQ	<ul style="list-style-type: none"> Customer Product Configuration (Solution Management in TAM*) Product Pricing Product Quote 	<ul style="list-style-type: none"> Pricing Quote 	Quote may potentially be mastered in CRM
4	Product Catalog	<ul style="list-style-type: none"> Commercial Products Design Technical Services Definition Product Lifecycle 	<ul style="list-style-type: none"> Product Bundle Service Resource 	Class definition of product, bundle, resource and service – these may be instantiated into assets at order run time
5	Activation / Provisioning	<ul style="list-style-type: none"> Service Order Technical Service Catalog Device Management 		



	System	Domain	Data Ownership	Potential Overlap
6	Inventory	<ul style="list-style-type: none">Physical and Logical InventoryInventory Lifecycle	<ul style="list-style-type: none">Resource (Customer-facing, Network-facing, Logical or Physical)	
7	Supply Chain Management	<ul style="list-style-type: none">ShippingPartner & Supplier ManagementProcurement	<ul style="list-style-type: none">ShippingPartner	
8	Enterprise Resource Planning	<ul style="list-style-type: none">HR ManagementCapital ManagementRisk ManagementFinancial Management	<ul style="list-style-type: none">Accounts ReceivableAccounts PayableCredit Risk	
9	Charging System	<ul style="list-style-type: none">ChargingBillingPaymentsCollections / Dunning	<ul style="list-style-type: none">BillChargeDunningUsagePayment	Dunning may be handled in ERP
10	Mediation	<ul style="list-style-type: none">Data CollectionData DistributionData Formatting and Enrichment		
11	Policy Management	<ul style="list-style-type: none">Subscriber Network Profile ManagementUsage ManagementResource Quota Management		
12	Network	<ul style="list-style-type: none">Service ControlService Delivery		

6.3 Entity Relationship Diagram

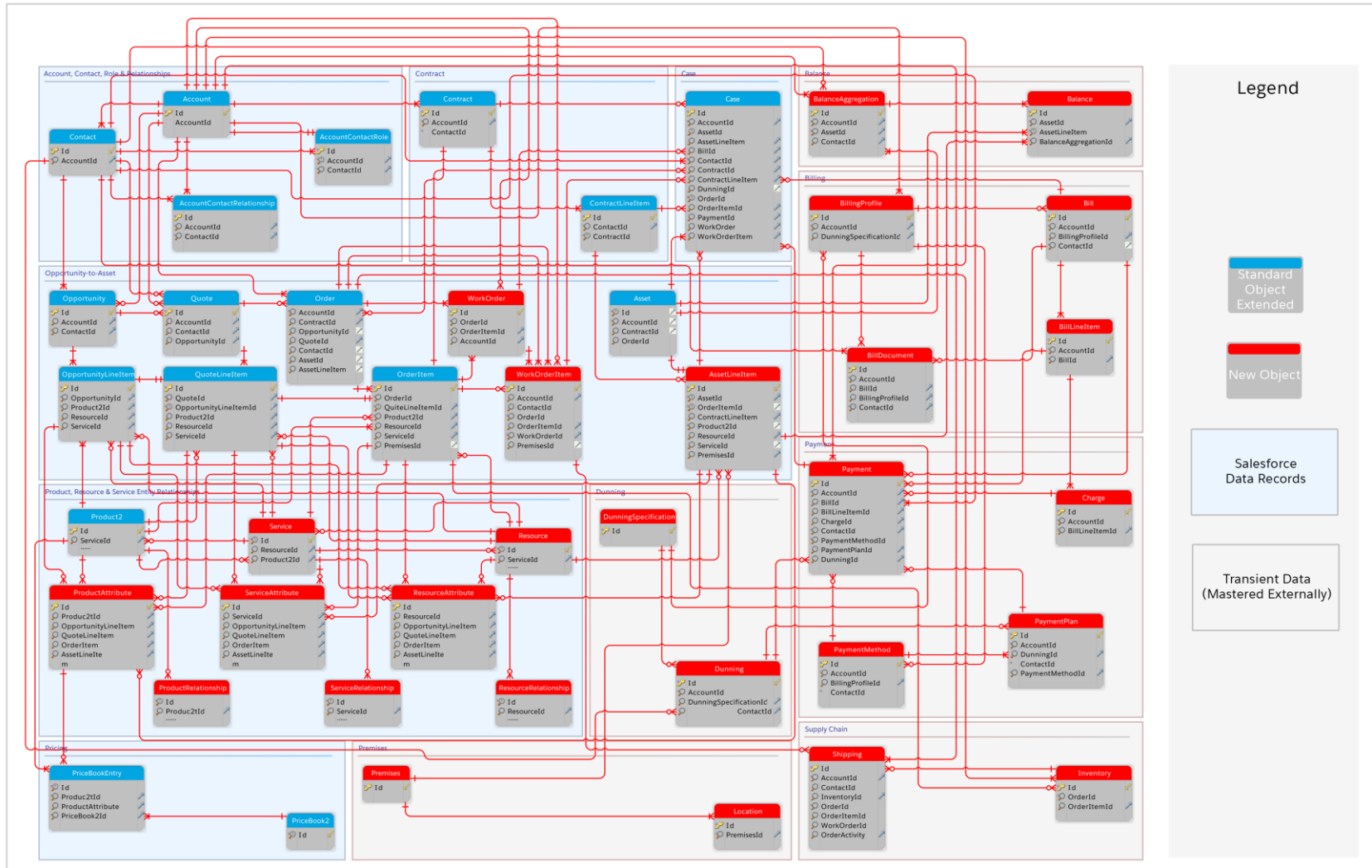
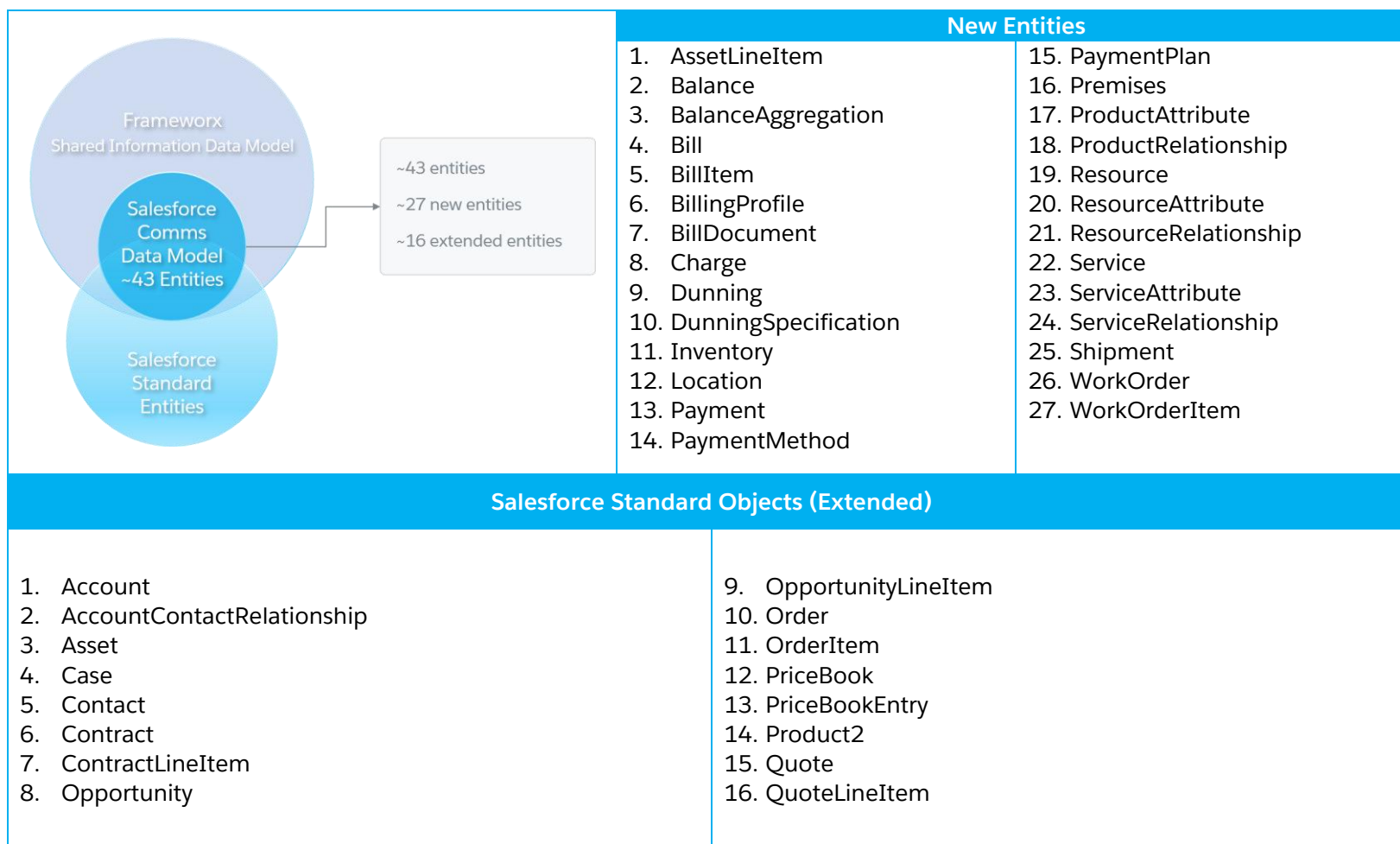


Figure 4. Salesforce communications data model entity relationship diagram

6.4 Data Model Specifications Summary

Summary:



6.5 Design Patterns

6.5.1 Account

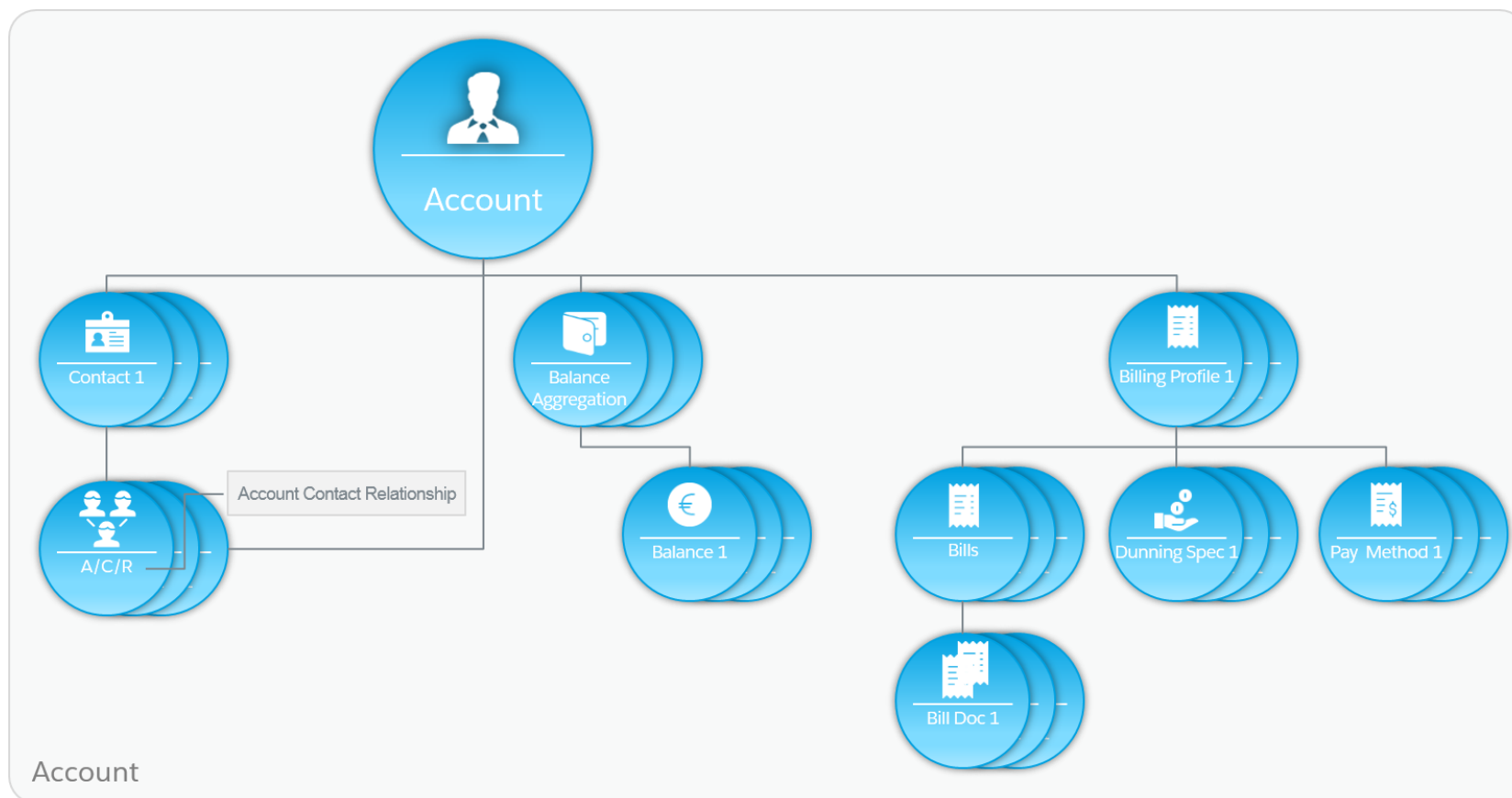


Figure 5. Account relationship with key aggregate business entities

6.5.2 Account Hierarchy

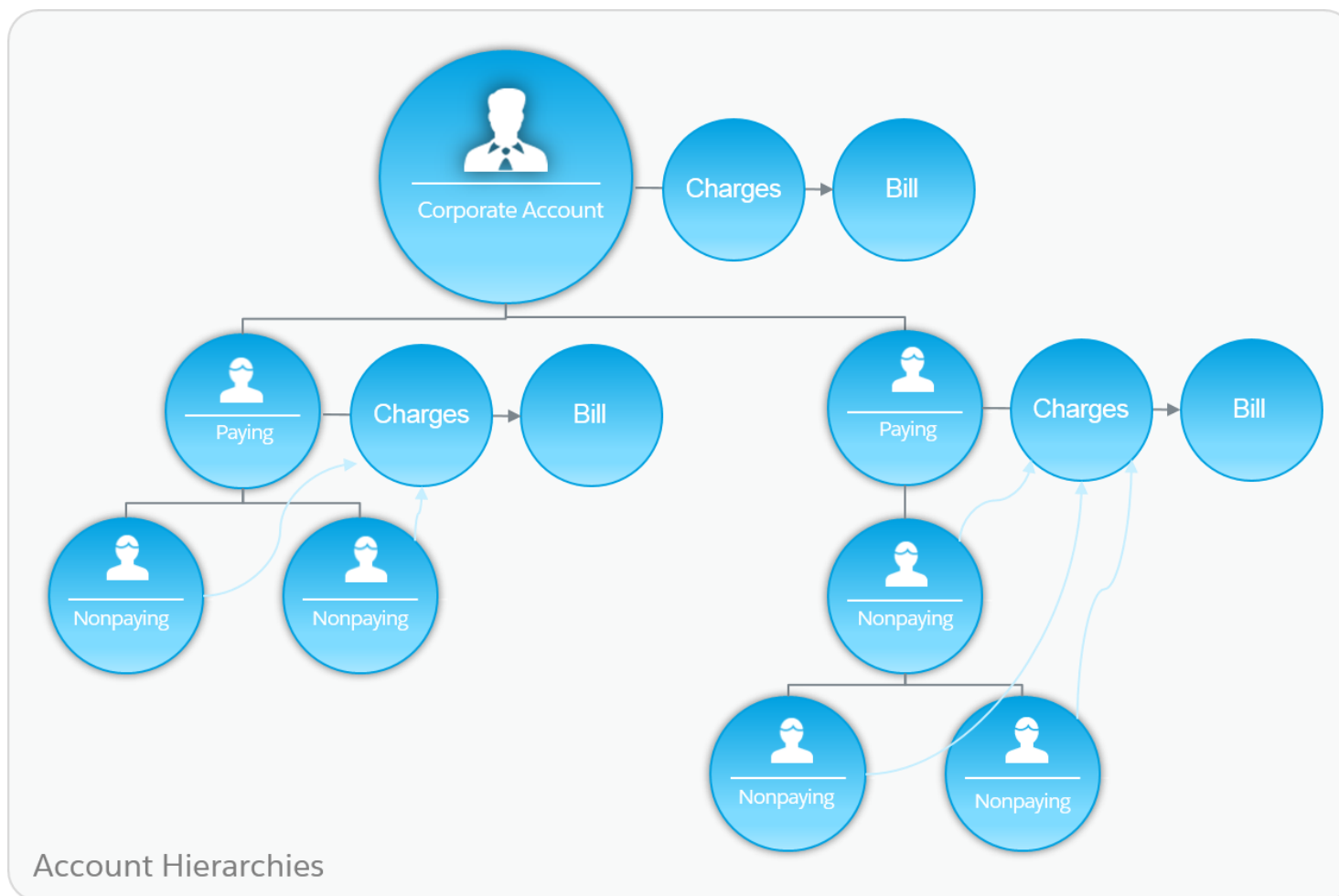


Figure 6. Account hierarchy, charging and billing relationship. A non-paying account's charges are rolled up to the parent account and bill.

6.5.3 Account and Assets

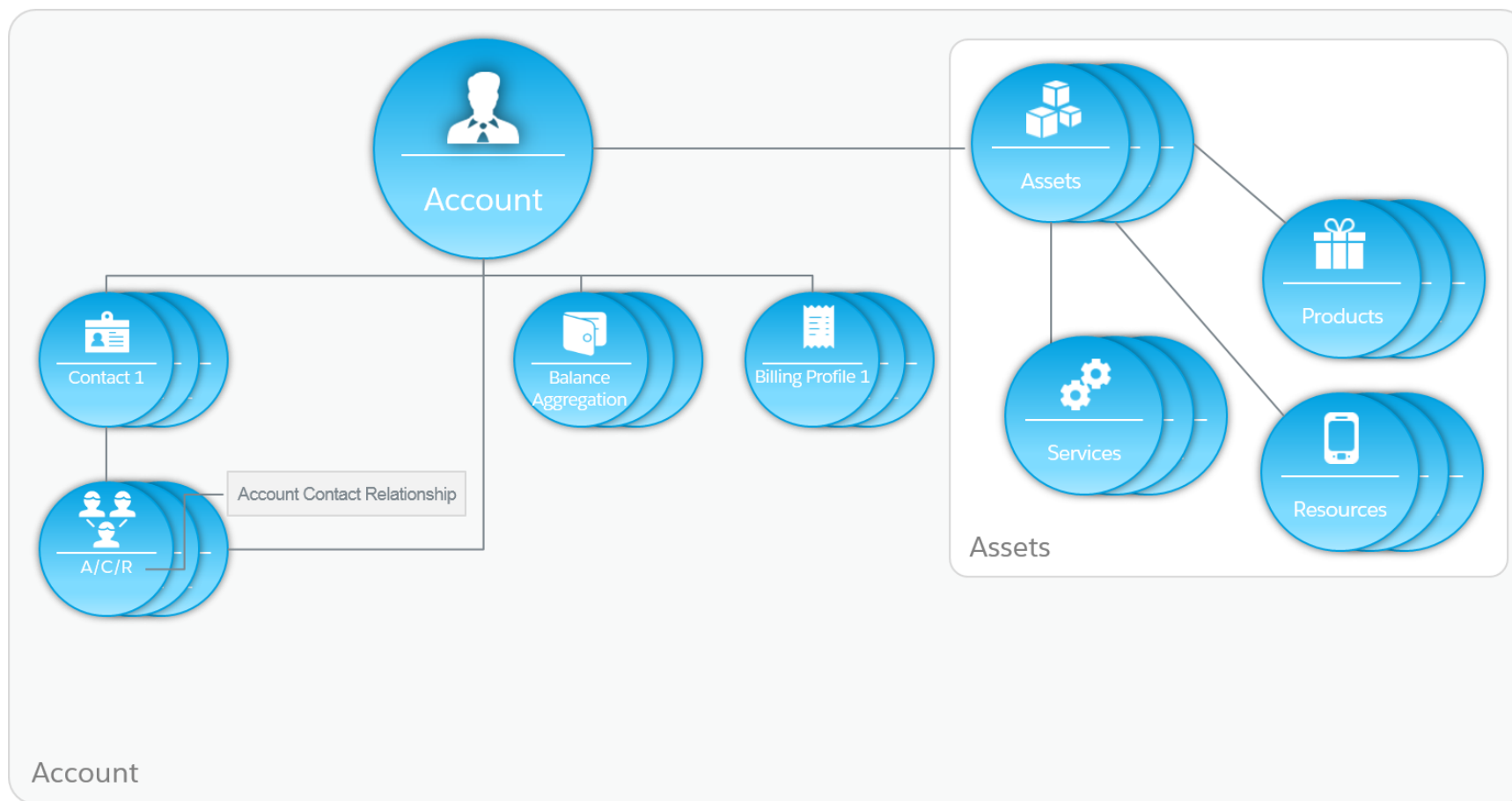


Figure 7. Account and Asset relationship. Services, resources and products are instantiated as assets.

6.5.4 Quote-to-Cash-to-Care Design Pattern

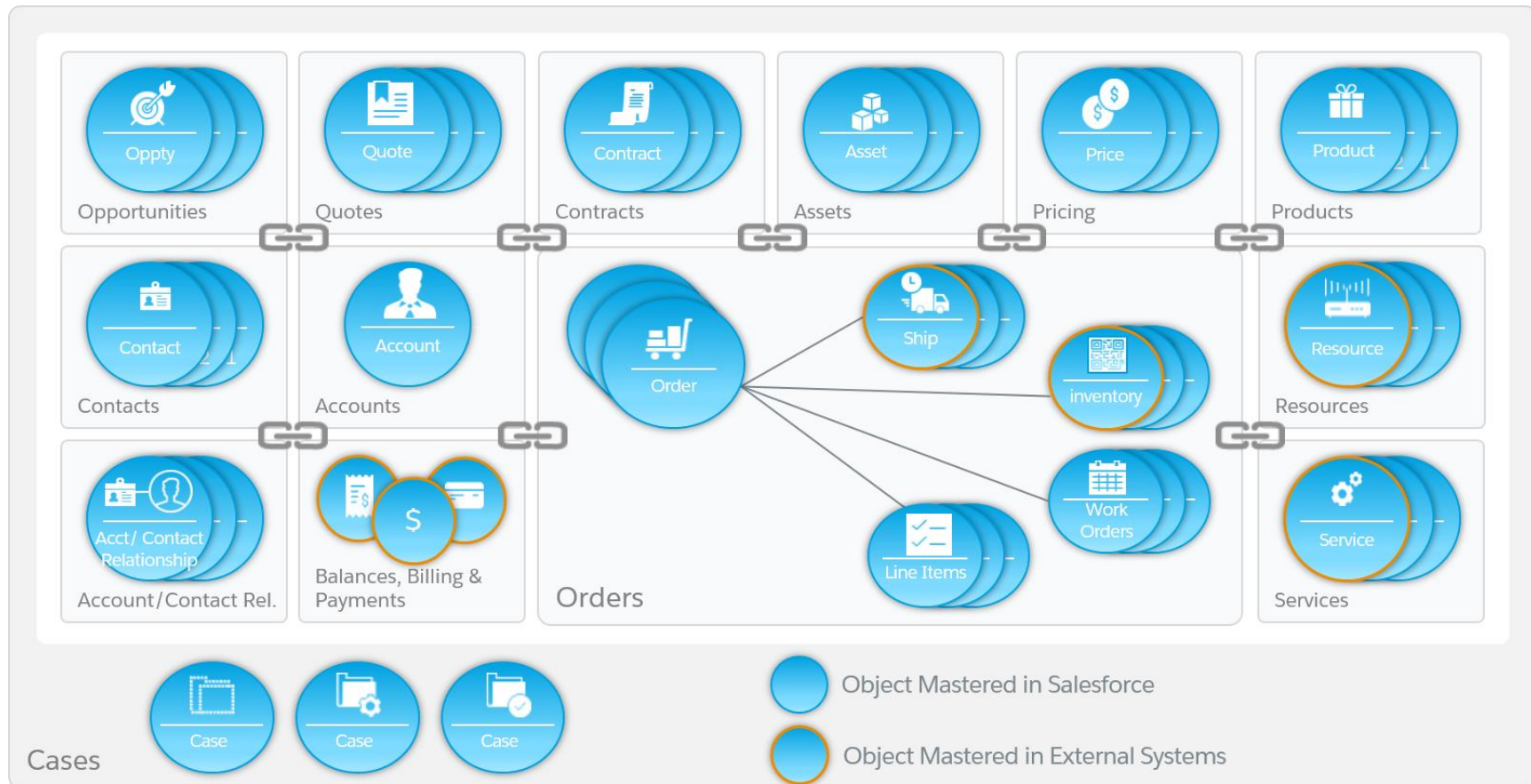


Figure 8. Pattern for Quote-to-Cash-to-Care: (1) Orders may be captured based on existing assets or new product offers/bundles (including services and resources) (2) Cases may be tracked against accounts, assets, orders, and order items.



6.6 Data Model Specification

Note that only extensions for existing standard Salesforce objects are shown. A complete listing of fields in every existing Salesforce standard object is provided in the Salesforce object model documentation.

Account			
Representation of individuals, households, corporations, organizations, and systems (in M2M scenarios) typically in commercial relationship with roles such as customer, partner, supplier, etc.			
AccountContactRelationship	reference	Currency for the account (e.g., USD, Euro, etc.)	
AccountCurrencyBalance	currency	Currency balance for the account and/or currency balances roll-up from all related or subordinate accounts (e.g., in a family account structure the balances of all individual user accounts may be rolled up to the parent's account in order to provide an aggregated view of all balances.)	
AccountSpendLimit	currency	Currency spend limit for the account	
BarringCode	picklist	Code for barring or suspending an account	
BarringReason	picklist	Reason for barring or suspending an account	
Created	date	Id assigned/used by an external system	
CreatedById	reference	The Id of the user/account that created the record	
ExternalId	string	Id assigned/used by an external system	
IsBarred	boolean	Indicates if the account is suspended or barred	
Modified	date	Date the record was modified	
ModifiedById	reference	The Id of the user/account that modified the record	
Use Cases			
Consumer Account – Individual		Consumer Account – Family or Household	
<ul style="list-style-type: none">1 user1 contactContact role: Account responsible party1 monthly subscription3 services [voice, data, messaging]4 balances [USD, Minutes, MB, Texts]		<ul style="list-style-type: none">1 account 4 members of the family4 account users4 contacts2 contact roles: Account responsible party, users6 devices (4 mobile, 1 set top box, 1 access device)1 monthly subscription	



<ul style="list-style-type: none">• 1 device• 1 payment method (direct debit)• 1 Invoice electronically available• Spend limit: \$200• Churn: <2%• Sat: >90%	<ul style="list-style-type: none">• 5 services [3 mobile (V/D/T), TV, Internet]• 6 balances [USD, Minutes, MB, Texts, GB (Internet), Movies] per user• Family sharing of non-currency resources• 3 payment methods [ACH, DD, CC]• 1 Invoice electronically available for the household• 1 electronic statement per user• Spend analytics• Service policies turned on (e.g., no texting service for kids after 10 PM)• Spend limit: \$1000• Churn: <2%• Sat: >90%
Business Account – SMB	Business Account – Corporate
<ul style="list-style-type: none">• 1 account 100 phone lines• 2 account profiles (admin and user)• 100 contact• Contact role: Account responsible party, user• 1 quarterly subscription• 100 device• 3 services [voice, data, messaging] per device• 3 balances [USD, Minutes, MB] per device• 1 payment method (invoice)• Spend limit: \$25,000• Churn: <2%• Sat: >90%	<ul style="list-style-type: none">• Hierarchical account [corporate, regions, departments (cost centers)]• Many accounts, profiles, contacts, and contact roles• Many customer plans• Many types of devices• Many relationships• Many services• Many Locations• Many invoices• Financial analytics
Partner Account	Supplier Account – Corporate



<ul style="list-style-type: none">• Partner type may be service provider, content provider, dealer, distributor, reseller etc.• Commercial offer sharing• Revenue sharing relationship• Hierarchical account structure• Reverse billing / settlements• Charging on behalf	<ul style="list-style-type: none">• Service provider, supplier, device manufacturer• Revenue sharing relationship• Hierarchical account structure• Reverse billing / settlements
Holding Account	System Account
<ul style="list-style-type: none">• A type of 'parent' account that provides a special relationship to another account or tree of accounts• Typically does not have any services.• Example: bank account with relationships to savings, checking. Investment accounts	<ul style="list-style-type: none">• A technical (non-commercial) account reserved for internal processes• May or may not belong to a person
Machine Account (M2M and IoT Business Scenarios)	Parent / Child Account
<ul style="list-style-type: none">• A type of 'hybrid' may act similar to an individual account, but does not have contractual links• Typically may be a provider and consumer of services• Example: M2M scenario of navigation device in a car. The Telematics service provider may treat the navigation system as a device providing service to a person, but the Communications service provider may view the system as an account consuming services	<ul style="list-style-type: none">• Any previously mentioned account may be linked to another account as a child or a parent account

AccountContactRelationship**Relationship between accounts and contacts, which have many-to-many relationship**



AccountId	reference	Account record Id
ContactId	reference	Contact record Id
Created	date	Date the record was created
CreatedById	reference	Created by
Description	textarea	Record description
ExternalId	reference	Id assigned/used by an external system
GroupId	reference	Reference to group or community to which this account/contact belongs
IsActive	boolean	Indicates whether the record is active
IsClosed	boolean	Indicates this record is closed
IsDeleted	boolean	Indicates whether the record was moved to the recycle bin
LastReferencedDate	date	Date the record was last accessed
LastViewedDate	date	Date the record was last viewed
Modified	date	Modified date
ModifiedById	reference	Modified by
Name	string	Record name
RelationshipType	picklist	Describes the type of relationship between accounts and contacts

Asset

Tangible or intangible value assigned to, owned, controlled or used by an account or users therein as a result of acquiring a commercial offer – it is typically the culmination of an order fulfillment.

AccountId	string	Reference to the account owner of the asset
AssetClass	string	Asset type (e.g., Equipment, currency, non-currency resources such as prepaid minutes etc.)
ContactId	reference	Reference to the contact owner of the asset
ContractId	reference	Reference to the contract covering this asset
Created	date	Date the record was created
CreatedById	reference	Created by
Description	textarea	Asset description
ExternalId	reference	Id assigned/used by an external system
Generation	picklist	Asset generation (e.g., inherited, 3G, 4G etc.)
InstallDate	date	Date the asset was installed
IsBarred	boolean	Indicates whether the is barred from being used, transferred etc.



IsClosed	boolean	Indicates whether the asset record is closed	
IsDeleted	boolean	Date the record was marked for deletion	
LastActivityDate	date	Date of last activity	
LastReferencedDate	date	Date the record was last referenced	
LastViewedDate	date	Date the record was last viewed	
Modified	date	Date the record was last modified	
ModifiedById	reference	Modified by	
Name	string	Asset name	
Network	string	Categorization of the asset by network	
OrderDate	date	Date the asset was ordered	
OrderId	reference	Reference to the order for this asset	date
PurchaseDate	date	Date the asset was purchased	
Quantity	double	Asset quantity	
ValidFor	int	Asset validity period	
ValidityEnd	date	Asset validity end date	
ValidityStart	date	Asset validity start date	
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor	
VendorCode	picklist	Asset vendor code	
VendorId	string	Asset vendor id	

AssetLineItem

Assets may be grouped or associated in different ways. AssetLineItem describes the characteristics of individual members of an asset group or association.

AccountId	string	Reference to the account owner of the asset
AssetClass	string	Asset type (e.g., Equipment, currency, non-currency resources such as prepaid minutes etc.)
ContactId	reference	Reference to the contact owner of the asset
ContractId	reference	Reference to the contract covering the parent asset
ContractLineItemId	reference	Reference to the contract line item covering this asset line item
Created	date	Date the record was created
CreatedById	reference	Created by
Description	textarea	Asset description



ExternalId	reference	Id assigned/used by an external system
Generation	picklist	Asset generation (e.g., inherited, 3G, 4G etc.)
InstallDate	date	Date the asset was installed
IsBarred	boolean	Indicates whether the is barred from being used, transferred etc.
IsClosed	boolean	Indicates whether the asset record is closed
IsDeleted	boolean	Date the record was marked for deletion
LastActivityDate	date	Date of last activity
LastReferencedDate	date	Date the record was last referenced
LastViewedDate	date	Date the record was last viewed
Modified	date	Date the record was last modified
ModifiedById	reference	Modified by
Name	string	Asset name
Network	string	Categorization of the asset by network
OrderDate	date	Date the asset was ordered
OrderId	reference	Reference to the order for the parent asset
OrderItemId	reference	Reference to the order item for this asset line item
PurchaseDate	date	Date the asset was purchased
Quantity	double	Asset quantity
ValidFor	int	Asset validity period
ValidityEnd	date	Asset validity end date
ValidityStart	date	Asset validity start date
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor
VendorCode	picklist	Asset vendor code
VendorId	string	Asset vendor id

Use Cases

Asset – Digital Content Product

Asset Line Item 1: Wizard of Oz SD Movie
Asset Line Item 2: The Beatles – Abbey Road Album

Asset – Triple-play Service

Asset Line Item 1: Voice
Asset Line Item 2: TV
Asset Line Item 3: Broadband



Asset – Resource

Asset Line Item 1: Phone number
Asset Line Item 2: IP Address
Asset Line Item 3: Wireless Router

Balance

Describes one type of balance instance that the customer may have in a virtual wallet. It is possible to have multiple megabyte balances, for example, each with a different validity and consumption rule (e.g., use the oldest bucket of megabytes first as these are expiring at the end of the month)

AccountId	reference	Reference to the account that owns this balance
AssetId	reference	Reference to the asset contributing to this balance
AssetLineItemId	reference	Reference to the asset line item contributing to this balance
BalanceAggregationId	reference	Reference to the balance aggregation record
BalanceClass	picklist	Balance class may be “Currency”, “Entitlement”, or “Counter”
BalanceType	picklist	Balance type may be “Prepaid”, “Postpaid”, “Loyalty Rewards” etc.
ConsumptionOrder	picklist	Order in which entitlements are consumed (e.g., Use First Expiring)
ContactId	reference	Reference to the contact the subject to this balance
Created	date	Date the record was created
CreatedById	reference	Record created by
Currency	picklist	Currency name
CurrencyAmount	currency	Currency balance amount
CurrencyIsoCode	picklist	Currency type (e.g., USD, Euro, etc.)
Description	text area	Description of the balance
EntitlementQuantity	double	Discrete quantity balance (e.g., 1000 GB, 2500 Minutes, 5 Songs, 10 Apps etc.), used for non-currency resources
EntitlementType	picklist	Type of resource tracked in the balance (e.g., Minutes, GB, USD, Euro etc.)
ExternalId	reference	Id assigned/used by an external system
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the recycle bin (true) or not (false)



IsShared	boolean	Indicates whether the balance is shared
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date the record was last modified
ModifiedById	reference	Record modified by
Name	string	Name of the record
OwnerId	reference	Owner of the record
SharedWithId	reference	Reference to the account with whom this balance is shared
SharedWithGroupId	reference	Reference to the group/account hierarchy with whom this balance is shared
Status	picklist	Balance status
ValidFor	int	Indicates validity of the entitlement in terms of discrete units (e.g., 3 months, 6 billing cycles, 24 hours etc.) from the ValidityStart
ValidityEnd	date	End date and time for the validity of the balance
ValidityStart	date	Starting validity date and time for the balance
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor

Use Cases

Balance – Currency

- USD, Euro, GBP etc. tracked and aggregated per account/ user / device / groups thereof
- Charges, discounts, adjustments, and payments impact balances

Entitlement –Non-currency

- Minutes, MB, Texts, etc. tracked and aggregated per account/ user / device / groups thereof
- Charges, discounts, adjustments, and payments impact balances
- May expire

Balance – Counters

- Counting activities, sessions, etc. for the purpose of triggering balance impacts (e.g., grant a free movie after every 10-movie purchase)

Balance – Loyalty

- Similar to non-currency but typically used with promotions and gamification (e.g., badges, rank)



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BalanceAggregation

A virtual wallet that contains balances and counters for a customer (e.g., USD - 34.90; Minutes - 289; Megabytes - 45893)

AccountId	reference	Reference to the account that owns this balance
AggregationCurrency	string	Currency name
AggregationType	picklist	Aggregation for group of accounts, group of contacts, group of assets etc.)
AggregationCounter	string	Unit of what is being aggregated (e.g., tokens, clicks, events, etc.)
AggregationEntitlement	picklist	Non-currency resources type for the entitlement (e.g., minutes, MB, Loyalty awards etc.)
ContactId	reference	Reference to the contact the subject of this balance
Created	date	Date the record was created
CreatedById	reference	Created by
CurrencyIsoCode	picklist	Currency type (e.g., 840 for USD, 978 for Euro, etc.)
Description	text area	Description of the balance
ExternalId	reference	Id assigned/used by an external system
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)
IsShared	boolean	Indicates whether the balance aggregate is shared
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last date the record was viewed
Modified	date	The date the record was last modified
ModifiedById	reference	User/account who last modified the record
Name	string	Name of the record
OwnerId	reference	Owner of the record
SharedWithId	reference	Reference to the account with whom this balance aggregation is shared
SharedWithGroupId	reference	Reference to the group/account hierarchy with whom this balance aggregation is shared
SpendLimit	double	Limit for spending currency or using entitlements (e.g., USD 500.00, 5 GB etc.)
SpendThreshold	percent	A specific value or a percentage value of spend limit to trigger actions such notifications
Status	picklist	Balance aggregation status



ValidFor	int	Indicates validity of the entitlement in terms of discrete units (e.g., 3 months, 6 billing cycles, 24 hours etc.) from the ValidityStart
ValidityEnd	date	End date and time for the validity of the balance
ValidityStart	date	Starting validity date and time for the balance
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor

Use Cases

One Account – One Balance Aggregation

- 1 account
- 1 user
- 1 BalanceAggregation
 - Currency balances
 - Non-currency balances (minutes, megabytes, movies)
 - Spend limit per balance
 - Non-currency balance buckets with different validities
 - Counters (loyalty points, badges and rewards etc.)

One Contact – Multiple Contacts – Multiple Balance Aggregations

- 1 account
- Multiple users and/or devices each with own profile and virtual wallets
- Each balance aggregation contains
 - Currency balances
 - Non-currency balances (minutes, megabytes, movies)
 - Spend limit per balance
 - Non-currency balance buckets with different validities
 - Counters (loyalty points, badges and rewards etc.)

Bill

A bill is a virtual object that aggregates itemized transactions.

AccountId	reference	Reference to the Account
AdditionalAddress	address	Extra address field
Additionality	string	Extra address field
Additional Country	string	Extra address field
AdditionalCountryCode	picklist	Extra address field
AdditionalLatitude	double	Extra address field



AdditionalLongitude	double	Extra address field
AdditionalName	string	Extra name field
AdditionalPostalCode	string	Extra address field
Additional State	string	Extra address field
AdditionalStateCode	picklist	Extra address field
AdditionalStreet	string	Extra address field
BillAdjustmentReason	picklist	Adjustment reason
BillAdjustmentReasonCode	picklist	Adjustment code
BillCreationDate	picklist	The actual time/date the bill was created
BillCredit	picklist	Payments, adjustments, credits received from any sources against the current bill
BillDisputeAmount	picklist	Total amount disputed in the current bill
BillDisputeCode	picklist	Dispute code
BillDisputeDate	date	Date the dispute was submitted
BillDisputeType	picklist	Dispute type/description
BillDocumentId	double	Reference to the invoice, statement, or any other document that is presented to the customer as an aggregated financial report
BillDueDate	double	Due date of the current bill
BillEndData	picklist	End of the billing cycle (e.g., February 19, 2015)
BillingAddress	address	Billing address field
BillingCity	string	Billing city
BillingCountry	string	Billing country
BillingCountryCode	picklist	Billing country code
BillingLatitude	double	Billing location latitude
BillingLongitude	double	Billing location longitude
BillingName	double	Name of billing contact
BillingPostalCode	string	Billing address postal code
BillingProfileId	reference	Reference to the billing profile Id
BillingStartDate	date	Start of the billing cycle (e.g., January 20, 2015)
BillingState	string	Billing state
BillingStateCode	picklist	Billing state code
BillingStreet	string	Billing street address
BillNumber	reference	Bill number



BillStatus	int	1. Open - bill is accumulating charges and open as the cycle may still be in progress 2. Pending - bill is ready for payment (i.e., no longer accumulating charges) 3. Closed - bill is fully paid nothing else is required
ContactId	reference	Reference to the contact the subject of this bill
Created	date	Date record was created
CreatedById	reference	Created by
Currency	picklist	Currency name
CurrencyAdjustment	reference	Currency adjustment to the bill
CurrentBilledAmount	date	Total of new charges
Description	text area	A method of conveying additional information about the bill including special notes or marketing messages
Description	text area	Description of the balance
EntitlementAdjustment	boolean	Amount of entitlement debited or credited
EntitlementType	boolean	Type of entitlement (e.g., Minutes, Free Movies, GB etc.)
ExternalId	boolean	Id assigned/used by an external system
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)
IsShared	boolean	Indicates whether the record is shared with other accounts
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date record was created
ModifiedById	reference	Date record was created
Name	string	Name of the record
OwnerId	reference	Owner of the record
ParentBillId	date	Reference to the bill id of the parent bill in case the current bill is part of billing hierarchy
PastDueAmount	date	Past due amount
PreviousUnpaidBalance	date	Total unpaid balance prior to the current bill. A portion or all of the previous unpaid balance may be past due.
Status	picklist	Bill status
TotalAmountDue	string	Sum of current charges, past due amount, any other credits and debits
Use Cases		



Bill – Prepaid Services	Bill – Postpaid Services
<ul style="list-style-type: none">• Prepaid scenarios require customers to make a payment and have a credit balance prior to service usage• A bill record is generated simply to aggregate and itemized charges; there is no “recurring bill processing” as in cycle-end bill processing in post-paid recurring scenarios• Bill presentation is equivalent to making detailed charge records available in any easily accessible format and medium	<ul style="list-style-type: none">• Postpaid means charging and payment after service / product usage.• In case of a subscription service, a cycle-end bill processing is required to finalize and prepare a bill for payment collection.• Bill presentation may require a paper paperless invoice or statement
Bill – Hybrid Services	Bill – Hierarchy of Accounts
<ul style="list-style-type: none">• Hybrid scenarios include both prepaid and postpaid services• Billing will be a combination of the previous items 1 and 2	<ul style="list-style-type: none">• An account hierarchy may include any combination of the previous items 1, 2, and 3• Bill presentation may require a paper paperless invoice or statement at various levels of the hierarchy• Bills may have parent/child relationships• A child bill may have no amount due as the charges may have been rolled up to the parent bill

BillDocument

Payment type may include credit/debit card, ACH, cash, check, voucher, etc. Additional fields may be defined to capture information such as credit card number, expiration, CVV, etc.

AccountId	reference	Reference to the Account record
BillId	picklist	Reference to the bill id
ContactId	reference	Reference to the contact
Created	date	Date record was created
CreatedById	reference	Date record was created



Description	text area	A method of conveying additional information about the bill item including special notes or marketing messages
DocuementURL	url	Link to the document storage location
DocumentCreated	date	Date the document was generated
DocumentDelivery	picklist	Delivery method (e.g., email, postal etc.)
DocumentFormat	picklist	Format for the document (PDF, HTML, etc.)
DocumentLocation	string	Physical storage location of the document
DocumentNumber	reference	Bill item number
Email	email	Recipient email
ExternalId	boolean	Id assigned/used by an external system
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date record was created
ModifiedById	reference	Modified by
Name	string	Name of the record
OwnerId	reference	Owner of the record
Status	picklist	Bill document status

Use Cases

Bill Document – Prepaid Services		Bill Document – Postpaid Services	
Statement – typically available online		Invoice – paper, electronic	
Bill Document – Hybrid Services		Bill Document – Hierarchy	
<ul style="list-style-type: none">• Prepaid services: statement• Postpaid services: invoice		<ul style="list-style-type: none">• Paper / paperless invoice or statement• Invoicing analytics	



Bill Document – Ad hoc purchases

- Content purchase from a partner
- Bill document: email or some of type of real-time notification (e.g., in-line notification, text etc.)

BillItem

Billing items are aggregation of various charges, credits, and adjustments including taxes and discounts into a bill. Items may be optionally tracked per service.

AccountId	reference	Reference to the Account record
BillId	picklist	Reference to the bill id
BillItemAdjustmentReason	picklist	Adjustment reason
BillItemAdjustmentReasonCode	picklist	Adjustment code
BillItemCreationDate	picklist	The actual time/date the bill item was created
BillItemCredit	picklist	Payments, adjustments, credits received from any sources against the current bill item
BillItemDisputeAmount	picklist	Total amount disputed in the current bill item
BillItemDisputeCode	picklist	Dispute code
BillItemDisputeDate	date	Date the dispute was submitted
BillItemDisputeType	picklist	Dispute type/description
BillItemDueDate	double	Due date of the current bill item
BillItemEndData	picklist	End of the billing cycle (e.g., February 19, 2015)
BillItemNumber	reference	Bill item number
BillItemStartDate	date	Start of the billing cycle (e.g., January 20, 2015)
BillItemStatus	int	1. Open - bill item is accumulating charges and open as the cycle may still be in progress 2. Pending - bill item is ready for payment (i.e., no longer accumulating charges) 3. Closed - bill item is fully paid nothing else is required
ContactId	reference	Reference to the contact



Created	date	Date record was created
CreatedById	reference	Date record was created
Currency	picklist	Currency name
CurrencyAdjustment	reference	Currency adjustment to the bill item
CurrendAmount	date	Total of new charges
Description	text area	A method of conveying additional information about the bill item including special notes or marketing messages
Description	text area	Description of the balance
EntitlementAdjustment	boolean	Amount of entitlement debited or credited
EntitlementType	boolean	Type of entitlement (e.g., Minutes, Free Movies, GB etc.)
ExternalId	boolean	Id assigned /used by an external system
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)
IsSplit	boolean	Indicates whether the record is shared with other accounts
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Modified by
ModifiedById	reference	Date record was modified
Name	string	Name of the record
OwnerId	reference	Owner of the record
PastDueAmount	date	Past due amount
PreviousUnpaidBalance	date	Total unpaid balance prior to the current bill item. A portion or all of the previous unpaid balance may be past due.
Status	picklist	Bill item status (e.g., Open, Pending, Closed)
TotalAmountDue	string	Sum of current charges, past due amount, any other credits and debits

Use Cases**Bill Item – Subscription**

Recurring charges per service or bundle

Bill Item – Usage

Usage charges



Bill Item – Purchases	Bill Item– Payments and Adjustments
One time purchases (e.g., game purchased from a partner)	Previous payments and adjustments
Bill Item – Discounts	Bill Item– Taxes
Itemized discounts and promotions	Various taxes

BillingProfile

Specifies common attributes about how an account should be billed based on different profiles

BillFormat	string	Bill format preference (e.g., Paper Invoice, Paperless Invoice or Statement in PDF format, etc.)
BillingActivationDate	date	First activation/provisioning date of billing for the account
BillingDay	int	In case an account is billed periodically, this field capture a preferred billing day of the cycle (e.g., "generate my monthly bill every 15th day of the month")
BillingDeliveryMethod	picklist	A method of describing how an account receives aggregated information about charges (e.g., Invoice by Mail, Invoice by Email, Online Statement etc.)
BillingMethod	picklist	1. Balance Forward - unpaid balances are forwarded to the next bill [default process in B2C markets] 2. Open Item - each bill is treated discretely
BillingPeriod	picklist	Billing frequency (e.g., Weekly, Monthly, Quarterly etc.)
BillingProfileType	picklist	Billing specification type may be prepaid, postpaid, etc. This field may be used to simplify the treatment of the bill record for prepaid accounts for example.
BillingSegment	picklist	A method of capturing customer segment information in case parties need to be billed based on segments. Segment may represent billing segments or customer segments.
Created	date	Date record was created
CreatedById	reference	Created by
CustomerSegment	picklist	Segmentation of customer
Description	textarea	Billing Specification description
DunningSpecificationId	reference	Reference to a dunning Specification
ExternalId	reference	Id assigned/used by an external system



IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date record was modified
ModifiedById	reference	Modified by
Name	string	Billing Specification name
OwnerId	reference	Owner of the record
PaymentMethod	picklist	Reference to the payment method
Status	picklist	Payment status

Use Cases

Billing Specification – Prepaid Services

- Recurring post-processing turned ON
- Charges are aggregated for financial management and customer care purposes

Billing Specification – Postpaid Services

- Recurring post-processing turned ON
- Charges are aggregated for financial management and customer care purposes at the end

Case

As part of customer service cases may be opened and tracked across all customer touch points (e.g., account, service, assets, bills, resources etc.)

AssetId	reference	Reference to the asset
AssetLineItemId	reference	Reference to the asset line item
BalanceId	reference	Reference to the balance



BalanceAggregationId	reference	Reference to the balance aggregation
BillDocumentId	reference	Reference to the bill document (e.g., customer invoice)
BillId	reference	Reference to a customer bill
BillItemId	reference	Reference to a customer bill item
ChannelCode	picklist	Channel code
ChannelDescription	text area	Channel description
ChannelName	string	Channel name
ChannelType	picklist	Channel type
ChargeId	reference	Reference to a customer charge
ContractId	reference	Reference to the contract
ContractLineItem	reference	Reference to the contract line item
Created	date	Created by
CreatedById	reference	Created by
DunningId	reference	Dunning Id
ExternalId	Reference	Id set/used by an external system
Modified	date	Modified date
ModifiedById	reference	Modified by
OrderId	reference	Order Id
OrderItemId	reference	Reference to the order item
PaymentId	reference	Reference to the payment
PremisesId	reference	Reference to the premises
Product2Id	reference	Reference to the product2
ResourceId	reference	Reference to the resource
ServiceId	reference	Reference to the service
ServiceProviderId	string	Service provider id
WorkOrderId	reference	Reference to the work order
WorkOrderItemId	reference	Reference to the work order item

Charge

Transaction-based financial activity including charge alterations such as discounts and promotional grants (e.g., usage, one-time purchases, recurring charges, 3 free movies etc.)



AccountId	reference	Reference to the account generating a chargeable usage event
ActivityDate	datetime	Actual time the activity took place (e.g., the exact time the phone call ended, the content was downloaded etc.)
ActivityId	string	Id of the activity generating the charge
ActivityName	string	Activity /session name
ActivityType	picklist	Charge event type (e.g., session, activity etc.)
BillItemId	reference	Reference to the bill items which collectively make up a bill. Items are aggregation of charges.
ChargeAmount	double	Final charge amount for the transaction; a charge could be positive (debit) or negative (credit). For example, a refund is a type of charge resulting in a credit to the account.
ChargeDate	datetime	Date the charge was processed
ChargedById	reference	Reference to the charging party
ChargeDiscountAmount	double	An amount by which a base charge was discounted or surcharged
ChargeDiscountQuantity	double	A quantity by which a base charge was discounted or surcharged
ChargeQuantity	double	Charge quantity in case the charge unit is a non-currency resource such as MB, Minute, Token etc.
ChargeSharingGroupId	string	Reference to a group sharing/splitting a charge (credit or debit type)
ChargeSponsoredAmount	double	Amount/portion of charge paid by a sponsor
ChargeSponsoredPercentage	percent	Percentage amount/portion of charge to be paid by a sponsor
ChargeSponsoredQuantity	double	Quantity/portion of charge to be paid by a sponsor
ChargeSponsorId	reference	Reference to the a party record sponsoring a charge
ChargeUnit	picklist	Charge basis (e.g., USD, Euro, Minute, MB etc.)
Currency	string	Currency name for this charge (e.g., USD, Euro etc.)
CurrencyIsoCode	picklist	ISO code of the currency
Description	textarea	Description of the chargeable event (e.g., Star Wars Episode III HD, International Call to Germany etc.)
ExternalId	reference	Object id assigned/used by an external system
IsTaxable	boolean	Indicates if the transaction is taxable
MeasuredQuantity	double	Measure quantity to be paired with UnitOfMeasure (e.g., 20 Minutes)
Modified	date	Date modified
ModifiedById	reference	Modified by
ResourceId	reference	Reference to the resource id
RevenueRecipientId	reference	Reference to the account ID of the revenue recipient (e.g., content provider partner etc.)



RevenueSharingAmount	double	Amount (portion of the transaction value) to be shared
RevenueSharingPercentage	percent	Percentage of the transaction value shared
ServiceId	reference	Linkage between the chargeable event and a service (e.g., a call session linked to mobile voice service)
ServiceProviderDescription	string	A method of displaying additional information about the service provider
ServiceProviderId	reference	A method of conveying information about who actually provided the service to enable the chargeable event (e.g., an account purchasing content from a third party partner of the customer's mobile operator). Additional fields may be defined to display more information about the service provider
SessionId	string	Id of the session generating the charge
SurchargeAmount	double	Extra charge amount
SurchargeReason	string	Reason for the extra charge
SurchargeType	picklist	Type of surcharge
SurchargeReasonCode	picklist	Code for the surcharge
TaxAmount	double	Tax portion of the charge
TaxAuthorityId	string	Taxing authority Id
TaxJurisdictionId	picklist	Indicates tax jurisdiction
TaxRate	percent	Tax percentage
TransactionId	string	External or internal unique id assigned to the transaction (e.g., session id for a phone call, activity id for a movie download etc.)
TransactionInfo	string	A method of displaying detailed information about the transaction (e.g., Call from 333-222-1111 to 777-444-6666)
TransactionType	picklist	Types may be periodic, usage, purchase, refund, adjustment etc.
UnitOfMeasure	picklist	Measurement unit for the chargeable event (e.g., Hour, Minute, MB, Number etc.)
UsageCategory	picklist	Usage category refers to Activity- or Session-based usage categories
UsageType	picklist	Specific usage modes (e.g., mobile-to-mobile call, International call, Video Streaming etc.)
Charge Types		Charge Example - Monthly Recurring Charge
<ul style="list-style-type: none">Subscription (or recurring)Usage charge (e.g., phone call)Non-recurring charge (e.g., charge for a movie)Purchase (e.g., purchasing a handset)		<ul style="list-style-type: none">AccountId19257854000ActivityTime20150715072312BillItemIditem-223409ChargeAlterationAmount0ChargeAmount19.95



	<ul style="list-style-type: none">• ChargeSharingGroupId null• Description Monthly Subscription• Currency USD (840)• EventMeasuredBy Month• Id 29483493849• NonCurrencyResource null• Quantity 0• ServiceId service.data.3431423• ServiceProviderDescription TMUSA• ServiceProviderId TMUSA-123645• TaxAmount 2.38• TransactionId 234789722• TransactionInfo Monthly Fee 2 line• TransactionType Recurring• UsageCategory null
1. Charge Example – Usage Charge	2. Charge Example – Purchase Charge
<ul style="list-style-type: none">• AccountId 19257854000• ActivityTime 20150715072423• BillItemId item.usage.233409• ChargeAlterationAmount 0• ChargeAmount 0• ChargeSharingGroupId null• Description Call Session• Currency USD (840)• EventMeasuredBy Second• Id 29483493849• NonCurrencyResource minute• Quantity 7200• ServiceId service.tel.3431423• ServiceProviderDescription TMUSA• ServiceProviderId TMUSA-123645• TaxAmount 0.03• TransactionId 234789722• TransactionInfo Call to 14082451000	<ul style="list-style-type: none">• AccountId 19257854000• ActivityTime 20150715092312• BillItemId item.purchase.223409• ChargeAlterationAmount 0• ChargeAmount 3.99• ChargeSharingGroupId null• Description Movie Purchase• Currency USD (840)• EventMeasuredBy null• Id 292783493849• NonCurrencyResource null• Quantity 1• ServiceId service.data.3431423• ServiceProviderDescription TMUSA• ServiceProviderId Amazon-237802• TaxAmount 0• TransactionId 234789722• TransactionInfo Movie.HD.Terminator



• TransactionType	Usage	• TransactionType	Purchase
• UsageCategory	Mobile to Mobile	• UsageCategory	null1

Contact

AccountContactRelationship	reference	Reference to the account contact relationship
ContactType	picklist	Contact type
Created	date	Created date
CreatedById	reference	Created by
ExternalId	reference	Id set/used by an external system
MailingCountryCode	picklist	Mailing country code
Modified	date	Modified date
ModifiedById	reference	Modified by
AccountContactRelationship	reference	Reference to the account contact relationship

Contract

Created	date	Date record was created
CreatedById	reference	Created by
ExternalId	reference	Id set/used by an external system
Modified	date	Modified date
ModifiedById	reference	Modified by

ContractLineItem

Individual components of a contract (e.g., a contract for a voice and data bundle may include 3 (three) ContractLineItems: 1. Service subscriptions 2. Service usage 3. Device purchase)



ChannelCode	picklist	Sales channel code
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name
ChannelType	picklist	Sales channel type
ExternalId	reference	Id set/used by an external system
PaymentMethodId	reference	Reference to the payment method
Product2Id	reference	Reference to the product
ResourceId	reference	Reference to the resource
ServiceId	reference	Reference to the service

Deposit

A deposit payment held against delivery of service or resources for a specified period of time

AccountId	reference	Reference to the Account record
AssetId	reference	Reference to the asset the connected to this deposit
ContactId	reference	Reference to the contact owner of the deposit
ContractId	reference	Reference to the contract the record specifying the deposit
Created	date	Date record was created
CreatedById	reference	Created by
Currency	string	Currency name
CurrencyIsoCode	picklist	ISO code of the currency
DepositCreationDate	date	The actual time/date the deposit was made
DepositAmount	double	Total of new charges
DepositInterest	percent	Interest (if any) that the deposit earns
DepositReturnDate	date	Date that deposit can be withdrawn
DepositReturnMethod	picklist	Specification of how the deposit is returned
Description	text area	Description of the balance
DespositTerm	int	Term for holding the deposit
ExternalId	reference	Id assigned /used by an external system
IsAccruingInterest	boolean	Indicates whether the deposit is accruing interest
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the record has been moved to the Recycle Bin (true) or not (false)



LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date record was modified
ModifiedById	reference	Modified by
Name	string	Name of the record
PaymentMethodId	reference	Payment method used to make the deposit
ReturnPaymentMethodId	reference	Reference to the payment method ID used to return the deposit
Status	picklist	Deposit status

Dunning

Dunning (bill or account) - if the customer has one bill then the entire account may be considered in collection

AccountId	reference	Reference to the account Id
AgencyCode	picklist	Code for the collections agency
AgencyContact	textarea	Contact info for the collections agency
AgencyId	reference	Id of the collections agency
BillId	reference	Reference to specific bill that has entered dunning
ContactId	reference	Reference to the dunning contact
ContractId	reference	Reference to the contract Id
Created	date	Date the record was created
CreatedById	reference	User/account creating the record
Currency	string	Currency type
CurrencyIsoCode	picklist	ISO currency code
CurrentDunningStep	string	Current dunning step
Description	textarea	Description of the dunning record
DunningAge	int	Number of days account or bill has been in dunning
DunningAmount	double	Total amount in dunning
DunningEntryDate	date	Date and time the bill or account entered dunning / collections process
DunningExitDate	date	Date and time the bill or account exited dunning / collections process
DunningOverride	boolean	A toggle to enter/exit dunning (e.g., False means entry; True means exit)
DunningSpecificationId	reference	Reference to dunning specification



DunningStatus	picklist	A field capturing important parameter/indication regarding dunning - may be viewed as a warning flag propagated to the ordering process
ExternalId	reference	Object id assigned/used by an external system
InDunning	boolean	True if party bill or account is in dunning (else False)
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the object has been moved to the Recycle Bin (true) or not (false)
IsReferredToAgency	boolean	Indicates whether the account/contact is referred to a collections agency
IsWrittenOff	boolean	Indicates whether the amount was writing off because of non-payment or referral to collections agency
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
NextAction	picklist	Action following the current step
OwnerId	reference	Owner of the record
PaymentPlanId	boolean	Payment plan to resolve dunning process
Status	picklist	Dunning status

DunningSpecification

Dunning specification per bill - if the account has one bill then the entire account may be considered in collection

AgencyCode	picklist	Code for the collections agency
AgencyContact	text area	Contact info for the collections agency
AgencyId	string	Id of the collections agency
CanBeOverriden	boolean	Indicates that dunning can be overridden
CanBeReferredToAgency	boolean	Indicates whether the account/contact can be turned over to a collections agency
CanBeWrittenOff	boolean	Indicates whether the dunning amount can be written off
CanUseDeposit	boolean	Indicates whether deposit can be used to pay debt
Created	date	Date record was created
CreatedById	reference	Created by
Currency	string	The object currency for this dunning



CurrencyIsoCode	picklist	ISO currency code
CurrentDunningStep	string	Current dunning step
Description	text area	Description of the dunning record
DunningActions	picklist	Actions applied in order when this dunning profile is triggered
DunningProfileType	picklist	Customer profile type used for this dunning profile
DunningTiggerAge	int	Time period (e.g., number of days of past due) for dunning to be triggered
DunningTiggerAmount	double	Amount for triggering dunning in conjunction with dunning age
ExternalId	reference	Id assigned/used by an external system
FreezeDeposit	boolean	Indicates that deposit can be returned until after dunning exit
InterestRate	percent	Interest rate for past due amount
IsClosed	boolean	Indicates if the record is closed
IsDeleted	boolean	Indicates whether the object has been moved to the Recycle Bin (true) or not (false)
IsReferredToAgency	boolean	Indicates whether the account/contact is referred to a collections agency
LastActivityDate	date	Last activity on this record
LastReferencedDate	date	Last reference to this record
LastViewedDate	date	Last the record was viewed
Modified	date	Modified by
ModifiedById	reference	Modified by
OwnerId	reference	Owner of the record
PaymentPlanId	reference	Payment plan to resolve dunning process
PenaltyAmount	double	Penalty amount to be assed for this profile
PenaltyType	picklist	Type of penalty
Status	picklist	Status of the profile (e.g., applied, in use, etc.)
SuspendService	boolean	Indicates whether the service can be suspended for this profile

Inventory

Dynamically instantiated record to query/update inventory information as part of an order

AccountId	reference	Reference to the account
CampaignId	reference	Reference to the campaign
CatalogId	reference	Reference to the product catalog
ContactId	reference	Reference to the contact



Created	date	Created date
CreatedById	reference	Created by
DealerCode	picklist	Dealer code
DealerName	string	Dealer name
DealerId	string	Dealer id
Description	textarea	Description
ExternalId	reference	Id set/used by an external system
IsAvailable	boolean	Indicates item is available
IsClosed	boolean	Indicates record is closed
IsDeleted	boolean	Indicates record is moved to the recycle bin
IsReserved	boolean	Indicates item is reserved
ItemAvailableQuantity	double	Item quantity available
ItemColor	string	Item color
ItemDescription	textarea	Item description
ItemDimension	string	Item dimension
ItemLocation	string	Item location
ItemName	string	Item name
ItemNumber	string	Item number
ItemPartNumber	string	Item part number
ItemSerialNumber	string	Item serial number
ItemSKU	string	Item SKU
ItemStatus	string	Item status
ItemWeight	string	Item weight
LastActivityDate	date	Last activity date
LastReferencedDate	date	Last reference date
LastViewedDate	date	Last view date
Modified	date	Modified date
ModifiedById	reference	Modified by
OrderId	reference	Reference to the order
OrderItemId	reference	Reference to the order item
OwnerId	reference	Reference to the record owner
Product2Id	reference	Reference to the product
ResourceId	string	Reference to the resource



ChannelCode	picklist	Sales channel code
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name
ChannelType	picklist	Sales channel type
ServiceProviderId	string	Service provider id
ServiceId	reference	Reference to the service
SpecialTerms	textarea	Special terms
StorageURL	url	Storage URL
StoreAddress	address	Store address
StoreCity	string	Store city
StoreCountry	string	Store country
StoreCountryCode	picklist	Store country code
StoreLatitude	double	Store latitude
StoreLongitude	double	Store longitude
StorePostalCode	string	Store postal code
StoreState	picklist	Store state
StoreStateCode	picklist	Store state code
StoreStreet	address	Store street
VendorCode	picklist	Vendor code
VendorId	string	Vendor id
WarehouseAddress	address	Warehouse address
WarehouseCity	string	Warehouse city
WarehouseCountry	string	Warehouse country
WarehouseCountryCode	picklist	Warehouse country Code
WarehouseLatitude	double	Warehouse latitude
WarehouseLongitude	double	Warehouse longitude
WarehousePostalCode	string	Warehouse postal code
WarehouseState	picklist	Warehouse state
WarehouseStateCode	picklist	Warehouse state code
WarehouseStreet	string	Warehouse street

**Location****Describes details of premises**

AccountId	reference	Reference to the account
AssetId	reference	Reference to the asset
AssetLineItemId	reference	Reference to the asset line item
CageId	string	Reference to the cage
CardId	string	Reference to the card
ContactId	reference	Reference to the contact
Created	date	Created date
CreatedById	reference	Created by
Description	text area	Location description
EquipmentId	string	Equipment id
ExternalId	reference	Id used/set by an external system
Floor	int	Floor where the asset is located
IsActive	boolean	Indicates location is active if true
IsClosed	boolean	Indicates location is closed if true
IsDeleted	boolean	Indicates whether the record is moved to the recycle bin
LastActivityDate	date	Last activity date
LastReferencedDate	date	Last reference date
LastViewedDate	date	Last view date
LocationAddress	address	Address
LocationCity	string	City
LocationCountry	string	Country
LocationCountryCode	picklist	Country code
LocationLatitude	double	Latitude
LocationLongitude	double	Longitude
LocationPostalCode	string	Postal code
LocationState	picklist	State / province
LocationStateCode	picklist	State / province code
LocationStreet	address	Street
LocationURL	url	Location map URL
Modified	date	Last modified date



ModifiedById	reference	Last modified by
OwnerId	reference	Owner user
PortNumber	string	Port number
PremisesId	reference	Reference to the Premises record
RackId	string	Rack id
RackLocation	string	Rack location
ResourceId	reference	Reference to the resource specification Id
RoomId	string	Room id
RowId	string	Row id
SerialNumber	string	Serial number
ServiceProviderId	string	Service provider id
SlotId	string	Slot id
SpecialInstruction	textarea	Special instructions for the field service personnel

Opportunity

A qualified lead that will potentially place an order

CatalogId	reference	Reference to the product catalog
DealerCode	picklist	Dealer code in case the opportunity is initiated from a dealer
ChannelCode	picklist	Sales channel code where the opportunity is initiated
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name
ChannelType	picklist	Sales channel type (e.g., Web-B2B)
ExternalId	reference	Id set/used by an external system

OpportunityLineItem

Individual line items under an opportunity

AvailableQuantity	double	Available quantity of the item of interest
CampaignId	reference	Linking opportunity to a marketing campaign
CatalogId	reference	Product catalog used for items in this opportunity



DealerCode	picklist	Dealer code for to link item to a dealer
DealerId	string	Dealer id
DiscountAmount	currency	Discount amount the line item
DiscountType	picklist	Type of discount for the line item
ExternalId	reference	Id set/used by an external system
ItemPartNumber	string	Item part number
PartenerId	reference	Part id in case the line item is owned/delivered by a partner
PromotionId	string	Linking a promotion to this line time
ResourceId	reference	Linking a resource class to this line item
ChannelCode	picklist	Sales channel code specific to this line item
ChannelDescription	textarea	Sales channel description specific to this line item
ChannelName	string	Sales channel name specific to this line item
ChannelType	picklist	Sales channel type specific to this line item
ServiceProviderId	reference	Service provider id specific to this line item
ServiceId	reference	Service class id specific to this line item

Order

BillingProfileId	reference	Reference to the billing profile
ContactId	reference	Reference to the contact
ContractId	reference	Reference to the contract
Created	date	Date the record was created
CurrencyIsoCode	picklist	Currency code
DunningStatus	picklist	Dunning/collections status
ExternalId	reference	Id set/used by an external system
IsAdditionOrder	boolean	Indicates whether the order is an addition to an previous order
IsCancelationOrder	boolean	Indicates whether the order is a cancelation order
IsChangeOrder	boolean	Indicates whether the order is a change order
IsMoveOrder	boolean	Indicates whether the order is to move for a service or asset
Modified	date	Date the record was last modified
ModifiedById	reference	User/account who modified the record



OrderHold	boolean	Indicates whether the order is on hold
OrderHoldReason	picklist	Order hold reason
OrderPriority	picklist	Order priority
OrderVersion	String	Order version
ProjectId	reference	Reference to the customer project requiring this order
ChannelName	String	Sales channel name
ChannelCode	picklist	Sales channel code
ChannelDescription	textarea	Sales channel description
ChannelType	picklist	Sales channel type
ServiceChannelName	String	Service channel name
ServiceChannelCode	picklist	Service channel code
ServiceChannelType	picklist	Service channel type

OrderItem

Individual components of an order (e.g., an ORDER for a voice and data bundle may include 3 (three) OrderItems: 1. Voice service subscription 2. Data service subscription 3. Device purchase)

AccountFrom	reference	Reference to the an account FROM which the object of the order line item is moved
AccountId	reference	Reference to the account placing the order
AccountTo	reference	Reference to the an account TO which the object of the order line item is moved (e.g., move my device from the corporate account to a personal account)
AssetId	reference	Reference to an EXISTING Asset that is the basis for the OrderItem. This is useful for Asset-based Order (e.g., add Sports Content Package to my existing package).
AvailableQuantity	double	Available item quantity for ordering
CampaignId	reference	Reference to the Campaign covering the OrderItem
ContactId	reference	Reference to the contact owner of this item
ContractId	reference	Reference to the Contract specifically covering this order line item
Created	Date	Date the record was created
CreatedById	reference	Created by user/account
DiscountAmount	currency	Discount amount applied to this order line item
DiscountPercentage	percent	Percent discount applied to this order line item
ExternalId	reference	Id assigned/used by an external system
ItemPartNumber	string	Part number of the item being ordered by this line item



Modified	date	Last modified date
ModifiedBy	reference	Last modified by
OrderDependency	boolean	The order line item may depend on prior fulfillment of a different ORDER (parent)
OrderId	reference	Reference to the parent Order record
OrderItemBase	reference	Reference to a "Base" order line item that the current order line item is modifying (e.g., changing device from iPhone 6 to iPhone 6 Plus)
OrderItemCharge	currency	Total final charge for this order line item - may be debit (+) or credit (-) (e.g., this order line item may result in a debit charge of \$235.00 to be paid by the customer, or this order line item may result in a credit charge of (\$50) to be refunded to the customer by the service provider.
OrderItemDelivery	date	Actual date/time for order line item delivery
OrderItemDependency	reference	Reference to another order line item
OrderItemExpected	date	Promised/expected date/time for order line item delivery
OrderItemListPrice	currency	List price of the item being ordered in this order line item
OrderItemName	string	A name for the order line item
OrderItemNumber	string	A number/id to track an order line item order across line item orders
OrderItemPriority	picklist	Priority of fulfilling the order line item within the order in cases where there are many line items with varying fulfillment priorities within an order
OrderItemStatus	picklist	Status of the order line item (e.g., Shipped, Activated, Closed, Pending etc.)
OrderItemUnitPrice	currency	Unit price of the item in case a quantity of more than one is ordered under this order line item
OrderLineItemDescription	textarea	A description text for the order line item
OrderedQuantity	double	Item quantity ordered in this OrderItem
PaymentMethodId	reference	Payment method for this order line item - this is relevant when different order line items are paid by different means (e.g., Visa, MC, Invoice, Prepaid Voucher, eCoupon etc.)
PriceBookEntryId	reference	Reference to the PriceBookEntry (the association between Product and PriceBook).
Product2Id	reference	Reference to the Product class being ordered in part or in whole by the OrderItem
ProjectId	reference	Reference to a project Id - this is relevant in B2B scenarios, where an order and associated line items may be tracked in a project
PromotionId	reference	Reference to the Promotion applied to the OrderItem
QuoteLineItemId	reference	Reference to the quote line item for this order line item
ResourceId	reference	Reference to the Resource class that is being ordered by the OrderItem. In case the resource is 'asetable' then it results in an asset record.
ChannelCode	picklist	Sales channel code
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name



ChannelType	picklist	Sales channel type
ServiceEndDate	date	Indicates the end date for a service or usage - useful for services or usage for a specified duration.
ServiceLocationFrom	string	Reference to the service location FROM which the service object of the order line item is moved (e.g., move TV service from current location to my new house)
ServiceId	reference	Reference to the Service class that is providing the technical capability under the OrderItem
ServiceProviderId	reference	Reference to the actual service provider delivering this order line item (may be reference to an account or a name)
ServiceStartDate	date	Service start date for this order line item (e.g., Broadband Subscription Start 02/02/2016)
ServiceLocationTo	reference	Reference to the service location TO which the service object of the order line item is moved (e.g., move TV service from current location TO new location)
Vendor	String	Reference to the vendor of this order line item - the service provider may be telco, but the vendor of this order line item may be a device manufacturer).

Payment

Payments on bills, bill items, usage events etc.

AccountId	reference	Reference to the account ID
AgentId	reference	Reference to the agent by id processing the payment
ContactId	reference	Contact id
Created	date	Date the record was created
CreatedById	reference	Record created by
Currency	string	Payment currency
CurrencyIsoCode	picklist	Currency code
DealerCode	picklist	Dealer code
DealerId	string	Dealer id
Description	textarea	Record description
ExternalId	reference	Id set/used by an external system
IsActive	boolean	Indicates whether the record is active
IsClosed	boolean	Indicates whether the record is closed
IsDeleted	boolean	I Indicates whether the record is moved to the recycle bin
IsInstallment	boolean	Indicates whether the payment is an installment
IsPartial	boolean	Indicates whether the payment is partial (true), full (false)



LastPaymentAmount	currency	Last payment amount
LastPaymentDate	date	Last payment date
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date record was viewed
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
Name	string	Record name
NextAction	picklist	Next action for this payment transaction
NextPaymentAmount	currency	Next expected payment amount
NextPaymentDate	date	Next payment date
PaymentDate	date	Current payment date
PayerId	reference	Payer Id (e.g., account id of customer making the payment)
PaymentAllocatedTo	picklist	Payment applied to record (e.g., subscription fee, purchase etc.)
PaymentAllocationType	picklist	Allocation type may be full, partial, bill payment, collections etc.
PaymentAmount	currency	Payment amount
PaymentInitiatedBy	reference	Payment initiated by customer, agent, external system etc.
PaymentMethodId	reference	Payment method
PaymentPlanId	currency	Payment plan
PaymentProcessed	boolean	Indicates whether payment was successfully processed (true)
PaymentScheduleDate	date	Payment schedule date
PaymentnyAllocationAmount	currency	Amount allocated (partial or full)
ChannelCode	picklist	Payment channel code
ChannelDescription	textarea	Payment channel
ChannelName	string	Channel description
ChannelType	picklist	Channel type
TransactionId	string	Transaction id

PaymentMethod

Payment type may include credit/debit card, ACH, cash, check, voucher, etc. Additional fields may be defined to capture information such as credit card number, expiration, CVV, etc.

AccountId	reference	Account id
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BankAccountNumber	string	Bank account number
BankAccountType	picklist	Bank account type
BankRoutingNumber	string	Bank routing number
BillingAddress	address	Billing address
BillingCity	string	Billing city
BillingCountry	string	Billing country
BillingCountryCode	picklist	Billing country Code
BillingName	string	Billing name
BillingPostalCode	string	Billing postal Code
BillingState	string	Billing state
BillingStateCode	picklist	Billing state Code
BillingStreet	string	Billing street
CardExpirationDate	date	Card expiration date
CardExpirationMonth	int	Card expiration month
CardExpirationYear	int	Card expiration year
CardNumber	string	Card number
CardSecurityId	string	Card security Id
CardType	picklist	Card type
ChannelCode	picklist	Channel code
ChannelDescription	text area	Channel description
ChannelName	string	Channel name
ChannelType	picklist	Channel type
ContactId	reference	Contact id
Created	date	Created date
CreatedById	reference	Created by
Currency	string	Currency type/name
CurrencyIsoCode	picklist	Currency code
Description	textarea	Payment description
EndDate	date	EndDate
ExternalId	reference	Id set/used by an external system
IsActive	boolean	Indicates record is active
IsDeleted	boolean	Indicates record is moved to the recycle bin
LastReferencedDate	date	Last reference date



LastViewedDate	date	Last view date
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
Name	string	Record name
PaymentDate	date	Payment date

PaymentPlan

Payment plan for a bill or an account - may be used to resolve dunning or as an installment plan to pay off other charges

AccountId	reference	Account ID
AgentId	reference	Reference to the agent ide initiation the payment
ContactId	reference	Contact id
Created	date	Date record was created
CreatedById	reference	Record created by
Currency	string	Currency
CurrencyIsoCode	picklist	Currency code
Description	textarea	Description
EndDate	date	Payment plan end date
ExternalId	reference	Final payment/installment amount
FinalPaymentAmount	currency	Number of regular payments
InstallmentAmount	currency	Regular installment amount
IsActive	boolean	Indicates record is active
IsDeleted	boolean	Indicated the record is moved to the recycle bin
LastReferencedDate	date	Last reference date
LastViewedDate	date	Last view date
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
Name	string	Record name
NumberOfPayments	int	Number of installment payments
PartialPaymentAllowed	boolean	Partial payment allowed (true); not allowed (false)
PaymentAllocatedTo	picklist	Payments are allocated to bill, bill item, or specific charges
PaymentMethodId	reference	Reference to the payment method



PaymentPlanFrequency	picklist	Payment period
PaymentPlanType	picklist	Plan type; purchase payment, collections etc.
ChannelCode	picklist	Channel code
ChannelDescription	text area	Channel description
ChannelName	string	Channel name
ChannelType	picklist	Channel type
StartDate	date	Payment plan start date

Premises

The premise object describes the physical and logical location of key entities such as assets, services, resources etc.

AccountId	reference	Account id
AssetId	reference	Reference to the asset
AssetLineItem	reference	Reference to the asset line item
ContactId	reference	Reference to the contact
Created	date	Created date
CreatedById	reference	Created by
Description	textarea	Description of the premises
ExternalId	reference	Id set/used by an external system
IsActive	boolean	Indicates the premises is active
IsDeleted	boolean	Indicates the premises is removed
LastReferencedDate	date	Last reference date
LastServiceCode	picklist	Code for the last service provided to this premises
LastServiceDate	date	Date of last service
LastTechnicianId	string	Reference to the last party providing service to this premises
LastViewedDate	date	Last record view date
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
Name	string	Name of premises
NumberOfVisits	int	Number of visits to the premises
NumerOfServiceCalls	int	Number of service calls for this premises
PartnerCode	picklist	Partner code in case the premises is owned or services are provided by a partner



PartnerId	string	Partner id in case the premises is owned or services are provided by a partner
StartDate	date	Premises effective service start date
Type	picklist	Premises type

PriceBookEntry

CanOverridePrice	boolean	Indicates whether the price can be overridden
Created	date	Date the record was created
CreatedById	reference	Created by
Currency	string	Currency type (e.g., US Dollar, Euro etc.)
EntitlementAmount	double	Entitlement granted to a customer (e.g., minutes, MB, loyalty points etc.)
EntitlementCharge	double	Price based on non-currency resources such as minutes, MB etc.
EntitlementType	picklist	Type of entitlement granted (e.g., minutes, MB etc.)
ExternalId	string	Id set/used by an external system
IsProrated	boolean	Indicates whether the recurring price is prorated
Modified	date	Record modification date
ModifiedById	reference	Record modified by user/account
ModifiedById	reference	Modified by user/account
PriceBookEntryVersion	string	Version
PriceMaximum	currency	Maximum price (i.e. the price of the item or the override price cannot exceed maximum price)
PriceMinimum	currency	Minimum price (i.e. the price of the item or the override price cannot be lower than minimum price)
PriceOverride	currency	The new (override) price
PricingCategory	picklist	Pricing category may be "Recurring", "One Time Purchase", or "Usage"
PricingType	picklist	Pricing type may be "Entitlement Grant", "Usage Charge", and "One Time Fee" such as Setup Fee or Cancelation Penalty. Examples: Charge: \$20.00 per Month Entitlement: 1000 Anytime Minutes per Month, \$5.00 Penalty
PromotionId	string	Reference to the promotion linked to this price
RecurringPrice	currency	Recurring price
RecurringPricePeriod	picklist	Recurring charge frequency (e.g., hourly, daily, weekly, monthly, quarterly, annually etc.)



UsagePrice	currency	Usage rates – rate combined with Unit of Measure describes fully the price for usage (e.g., \$0.25 / Minute, \$5.00 / Movie etc.)
UsageRateUOM	picklist	Unit of measure for usage pricing (e.g., per Minute, Hour, GB, App, Movie etc.)
ValidFor	int	Pricing valid for discrete period (e.g., weeks, months, billing cycles etc.)
ValidityEnd	date	Pricing validity start
ValidityStart	date	Pricing validity end
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor

Product2**Commercial product offering specification instantiated as assets**

Cardinality	int	Quantity allowed for purchase (e.g., a minimum of 1 and a maximum of 5). By default the cardinality may be 1 (i.e., a minimum of 1 product purchase is required)
CatalogId	string	Catalog containing this product
ChannelCode	picklist	Sales channel code
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name
ChannelType	picklist	Sales channel type
Created	date	Date the record was created
CreatedById	reference	User/account that created the record
ExternalId	reference	Id set/used by an external system
IsBundle	boolean	Validity start date and time for the product
MarketSegment	picklist	Market segment for which this product was designed
Modified	date	Date modified
ModifiedById	reference	Modified by
ProductLine	picklist	Indicates to the brand or product line that contains this commercial offer
ProductPriority	string	Product priority is important when several similar products are purchased (e.g., Free Period Product has highest priority for usage as it expires first)
ProductStatus	picklist	The status of the product (e.g., active, design stage, testing, etc.)
ProductType	picklist	Indicates whether the product is physical, logical, service, digital content etc.
ProductVersion	string	Object version
ResourceId	reference	Reference to the resource specification class in case the product is a resource type



ServiceId	string	Reference to the service specification class
ValidFor	int	Validity period for the product (e.g., week, month etc.)
ValidityEnd	date	Validity end date and time for the product
ValidityStart	date	Validity start date and time for the product
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor

ProductAttribute

Key/value pair describing a characteristic of a product (e.g., Color/Pink for a device)

AssetLineItemId	reference	Reference to the asset line item requiring this attribute
AttributeName	string	Attribute name
AttributeValue	picklist	Attribute value
ContractLineItemId	reference	Reference to the contract line item requiring this attribute
Created	date	Date record was created
CreatedById	reference	Record created by
Description	textarea	Description of the attribute
ExternalId	reference	Id assigned/used by an external system
IsActive	boolean	Indicates record is active
IsDeleted	boolean	Indicates record is marked for archiving/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
OpportunityLineItemId	reference	Reference to the opportunity line item requiring this attribute
OrderItemId	reference	Reference to the order item requiring this attribute
Product2Id	reference	Reference to the product2 requiring this attribute
QuoteLineItemId	reference	Reference to the quote line item requiring this attribute

**ProductRelationship****Relationship between products (e.g., bundle of products)**

Created	date	Reference to the catalog to which this product belongs
CreatedById	reference	Created by user/account
Description	textarea	Product relationship description
ExternalId	reference	Id assigned/used by an external system
IsActive	boolean	Indicates the record is active
IsDeleted	boolean	Indicates the record is marked for archival/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
Name	string	Relationship name
Product2Id	reference	Reference to the resource that is part of this relationship
RelationshipType	picklist	Relationship type (e.g., component, bundle, parent, child etc.)

Quote

The Quote object provides shopping cart capabilities required in B2C business processes. Customers will configure products, services and pricing to receive instant quotes. Business logic will be required to dynamically generate an Opportunity to bypasses Opportunity-to-Quote dependence. Upon checkout the Cart is converted into an Order. The Cart has a dependence on Contact.

AdditionalAddress	string	Additional address fields
Additional Country	string	Additional address fields
Additional State	string	Additional address fields
BillingCountryCode	picklist	Billing address field
BillingProfileId	reference	Reference to the billing profile
BillingState	string	Billing address field
BillingStateCode	picklist	Billing address field
BillingStreet	address	Billing address field
ContactId	reference	Contact id
ContractId	reference	Contract id



Created	date	Date the record was created
CreatedById	reference	User/account that created the record
CurrencyIsoCode	picklist	Currency code
Description	textarea	Quote description
ExpirationDate	date	Quote expiration date
ExternalId	string	Id set/used by an external system
Fax	phone	Fax number
Modified	date	Date the record was modified
ModifiedById	reference	User/account that last modified the record
ChannelCode	picklist	Sales channel code
ChannelDescription	text area	Sales channel description
ChannelName	string	Sales channel name
ChannelType	picklist	Sales channel type
ShoppingCartId	string	Shopping cart by id used for this quote
StartDate	date	Effective start date for the quote

QuoteLineItem

Individual line items in a quote

AssetId	reference	Reference to the account in case an existing customer is configuring the Cart.
AvailableQuantity	double	Quantity available
CampaignId	reference	Campaign id (if any)
CatalogId	reference	Product catalog id
ChannelCode	picklist	Channel code
ChannelDescription	text area	Channel description
ChannelName	string	Channel name
ChannelType	picklist	Channel type
Created	date	Created date
CreatedById	reference	Created by
DealerCode	picklist	Dealer code
DealerId	string	Dealer id
DealerName	string	Dealer name



DiscountAmount	double	Fixed discount amount
DiscountType	picklist	Discount type (e.g., promotion, loyalty etc.)
ExternalId	reference	Id assigned/used by an external system
GrantAmount	double	Non-currency resource grant amount (e.g., 1000 minutes, 4000 MB etc.)
GrantType	picklist	Non-currency resource grant amount (e.g., minutes, MB etc.)
ItemPartNumber	string	Part number of the item in this quote line item
Modified	date	Date the record was last modified
ModifiedById	reference	User/account that last modified the record
OpportunityLineItemId	reference	Reference to the opportunity line item
PartenerId	reference	Partner by id providing this line item
PromotionId	string	Promotion by id for this line item
ResourceId	reference	Resource class for this line item
ServiceId	reference	Service class for this lime item
Vendor	reference	Vendor for this line item

Resource

A class definition of logical and physical resources that may be purchased, subscribed to or used by customers or other parties as part of acquiring a commercial offer

Created	date	Created date
CreatedById	reference	Created by
Description	textarea	Description of the resource
HasLogicalResourceDependency	boolean	Resource on a logical resources (e.g., IP address etc.)
HasPhysicalResourceDependency	boolean	Resource depends on a physical resource (e.g., set-top box etc.)
IsAtomic	boolean	Indicates the resource stand-alone
IsLogical	boolean	Indicates the resource is of logical type if true
IsOperational	boolean	Indicates resource is operational if true
IsPhysical	boolean	Indicates a physical resource if true
IsResourceBundle	boolean	Indicates whether this resource is part of a bundle
ModelNumber	string	Resource model number
Modified	date	Date modified
ModifiedById	reference	Modified by



Name	string	Resource name
Network	string	Name of the network utilizing the resource
PartNumber	string	Resource part number
Product2Id	reference	Reference to Product2 dependent on this service
ResourceCapacity	string	Resource capacity value
ResourceCapacityType	picklist	Measure of resource capacity
ResourceType	picklist	Reference to the service catalog containing this service
ResourceUsage	picklist	Resource deployment options
SerialNumber	string	Resource serial number
ServiceId	reference	Reference to the service that depends on this resource
SkuNumber	string	Resource SKU number
SoftwareVersion	string	Software version (if any) upon which this resource depends
SpecificationUrl	url	Resource specification URL
ValidFor	int	Validity period (e.g., 6 months)
ValidityEnd	date	Resource validity end date
ValidityStart	date	Resource validity start date
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor
VendorCode	picklist	Vendor code
VendorName	reference	Vendor id
Version	string	Resource object version

ResourceAttribute

Key/value pair describing a characteristic of a resource (e.g., Color/Pink for a device)

AssetLineItemId	reference	Reference to the asset line item requiring this attribute
AttributeName	string	Attribute name
AttributeValue	picklist	Attribute value
ContractLineItemId	reference	Reference to the contract line item requiring this attribute
Created	date	Date record was created
CreatedById	reference	Record created by
Description	textarea	Description of the attribute
ExternalId	reference	Id assigned/used by an external system



IsActive	boolean	Indicates record is active
IsDeleted	boolean	Indicates record is marked for archiving/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
OpportunityLineItemId	reference	Reference to the opportunity line item requiring this attribute
OrderItemId	reference	Reference to the order item requiring this attribute
ResourceId	reference	Reference to the resource requiring this attribute
QuoteLineItemId	reference	Reference to the quote line item requiring this attribute

ResourceRelationship

Relationship between resources (e.g., bundle of resources)

Created	date	Reference to the catalog to which this product belongs
CreatedById	reference	Created by user/account
Description	textarea	Product relationship description
ExternalId	reference	Id assigned/used by an external system
IsActive	boolean	Indicates the record is active
IsDeleted	boolean	Indicates the record is marked for archival/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
Name	string	Relationship name
ResourceId	reference	Reference to the resource that is part of this relationship
RelationshipType	picklist	Relationship type (e.g., component, bundle, parent, child etc.)

**Service**

A class definition of technical capabilities that may be purchased, subscribed to or used by customers or other parties as a result of acquiring a commercial offer or entering into a commercial relationship

Created	date	Created date
CreatedById	reference	Created by
Description	textarea	Description of the service
HasLogicalResourceDependency	boolean	Service depends on logical resources (e.g., IP address etc.)
HasPhysicalResourceDependency	picklist	Service depends on physical resource (e.g., set-top box etc.)
HasQoS	boolean	Service is linked to a quality of service guarantee
HasSLA	boolean	Service is linked to a service-level agreement
HasSubType	boolean	Service has sub types (e.g., LTE/voice, LTE/data etc.)
IsAtomic	boolean	Indicates the service stand-alone
IsCustomerFacing	boolean	Indicates service is customer facing (e.g., telephony, broadband etc.)
IsEnabled	boolean	Indicates service is activated
IsMandatory	boolean	Indicates whether this service is part of a bundle
IsResourceFacing	boolean	Indicates whether this service is a network service (e.g., VPN etc.)
IsServiceBundle	boolean	Indicates whether this service instance is part of a bundle
IsSubType	boolean	Indicates whether this service is a sub-service (e.g., LTE/data, LTE/voice etc.)
Modified	date	Date service record was modified
ModifiedById	reference	Modified by
Name	string	Service name
Network	string	Network type (e.g., 4G LTE, IP, Cable etc.)
Product2Id	reference	Reference to Product2 dependent on this service
ResourceId	reference	Reference to Resource upon which this service depends
ServiceCatalogId	reference	Reference to the service catalog containing this service
ServiceRelationshipId	reference	Reference to the relationship record in case this service is part of a composite service
ServiceSubType	picklist	Service subtype specification if this service happens to be a subtype
ServiceUsageType	picklist	Usage may be based on time (e.g., duration), volume (e.g., 2 GB), count (e.g., 2 movies, 100 Minutes etc.),
SoftwareVersion	string	Software version (if any) upon which this service depends
SpecificationURL	url	Service specification URL



UnitOfMeasure	picklist	The unit of measure for this service (e.g., Minutes, MB, Days, Number etc.)
ValidFor	int	Validity period (e.g., 6 months)
ValidityEnd	date	Service validity end date
ValidityStart	date	Service validity start date
ValidityUnit	picklist	Validity unit (e.g., Hour, Day, Month, Billing Cycle etc.) used with ValidFor
VendorCode	picklist	Vendor code
VendorId	reference	Vendor id
Version	string	Service object version

ServiceAttribute**Key/value pair describing a characteristic of a service**

AssetLineItemId	reference	Reference to the asset line item requiring this attribute
AttributeName	string	Attribute name
AttributeValue	picklist	Attribute value
ContractLineItemId	reference	Reference to the contract line item requiring this attribute
Created	date	Date record was created
CreatedById	reference	Record created by
Description	textarea	Description of the attribute
ExternalId	reference	Id assigned/used by an external system
IsActive	boolean	Indicates record is active
IsDeleted	boolean	Indicates record is marked for archiving/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
OpportunityLineItemId	reference	Reference to the opportunity line item requiring this attribute
OrderItemId	reference	Reference to the order item requiring this attribute
ServiceId	reference	Reference to the service requiring this attribute
QuoteLineItemId	reference	Reference to the quote line item requiring this attribute

**ServiceRelationship****Relationship between resources (e.g., bundle of resources)**

Created	date	Reference to the catalog to which this product belongs
CreatedById	reference	Created by user/account
Description	textarea	Product relationship description
ExternalId	reference	Id assigned/used by an external system
IsActive	boolean	Indicates the record is active
IsDeleted	boolean	Indicates the record is marked for archival/deletion
LastReferencedDate	date	Last date the record was referenced
LastViewedDate	date	Last date the record was viewed
Modified	date	Last date the record was modified
ModifiedById	reference	Modified by
Name	string	Relationship name
ServiceId	reference	Reference to the service that is part of this relationship
RelationshipType	picklist	Relationship type (e.g., component, bundle, parent, child etc.)

Shipment**Dynamically instantiated record to capture shipment information as part of an order**

AccountId	reference	Reference to the account placing the order
AssetId	reference	Reference to an existing asset for asset-based ordering
AssetLineItemId	reference	Reference to an existing asset line item for asset-based ordering
BillingAddress	address	Billing address
BillingCity	string	Billing city
BillingCountry	string	Billing country
BillingCountryCode	picklist	Billing country code
BillingLatitude	double	Billing
BillingLongitude	double	
BillingName	string	
BillingPostalCode	string	
BillingProfileId	reference	



BillingState	string	
BillingStateCode	picklist	
BillingStreet	string	
CampaignId	reference	
CatalogId	reference	
Contact	reference	
ContactId	reference	
Created	date	Date record was created
CreatedById	reference	Created by
Currency	currency	Currency type
CurrencyIsoCode	picklist	Currency code
DealerCode	picklist	Dealer code
DealerId	string	Dealer id
DealerName	string	Dealer name
DeliveryDate	double	Delivery date
DeliveryPromisedDate	double	Promised delivery date
Description	text area	Shipment description
ExternalId	reference	Id set/used by an external system
HasSameBillingShippingAddress	boolean	Indicates same shipping and billing address
HasSubComponents	boolean	Indicates shipment has components
InventoryId	reference	Reference to the inventory record
IsAvailable	boolean	Indicates inventory is available
IsClosed	boolean	Indicates record is closed
IsDeleted	boolean	Indicates record is moved to the recycle bin
IsShippedSeparately	boolean	Indicates shipment occurs in multiple stages
ItemColor	string	Item Color
ItemDescription	textarea	Item Description
ItemDimension	text area	Item Dimension
ItemLocation	string	Item Location
ItemName	string	Item Name
ItemNumber	int	Item Number
ItemPartNumber	string	Item Part Number
ItemSerialNumber	string	Item Serial Number



ItemSKU	string	Item SKU
ItemStatus	boolean	Item Status
ItemWeight	string	Item Weight
LastActivityDate	double	Last Activity Date
LastReferencedDate	double	Last Referenced Date
LastViewedDate	double	Last Viewed Date
ModelNumber	string	Model Number
Modified	date	Modified date
ModifiedById	reference	Modified by
Name	string	Item name
OrderItemId	reference	Order Item Id
OrderId	reference	Order Id
OwnerId	reference	Owner Id
PartNumber	string	Part Number
Product2Id	reference	Product2Id
ChannelCode	picklist	Channel Code
ChannelDescription	string	Channel Description
ChannelName	string	Channel Name
ChannelType	picklist	Channel Type
ServiceProviderId	string	Service Provider Id
ServiceId	reference	Service Specification Id
ShippedBy	string	Shipped By
ShippingAddress	address	Shipping Address
ShippingCity	string	Shipping City
ShippingClass	picklist	Shipping Class
ShippingCost	currency	Shipping Cost
ShippingCountry	string	Shipping Country
ShippingCountryCode	picklist	Shipping Country Code
ShippingDate	date	Shipping Date
ShippingLatitude	double	Shipping Latitude
ShippingLongitude	double	Shipping Longitude
ShippingName	string	Shipping Name
ShippingOrderId	string	Shipping Order Id



ShippingOrderURL	url	Shipping Order URL
ShippingPostalCode	string	Shipping Postal Code
ShippingState	string	Shipping State
ShippingStateCode	picklist	Shipping State Code
ShippingStreet	string	Shipping Street
ShippingTrackingId	string	Shipment tracking ID
ShippingVendor	picklist	Shipping Vendor
SkuNumber	string	SKU Number
SpecialHandlingCost	currency	Special Handling Cost
SpecialInstructions	text area	Special Instructions
SpecialTerms	text area	Special Terms
StoreAddress	address	Store Address
StoreCity	string	Store City
StoreCountry	string	Store Country
StoreCountryCode	picklist	Store Country Code
StoreLatitude	double	Store Latitude
StoreLongitude	double	Store Longitude
StorePostalCode	string	Store Postal Code
StoreState	string	Store State
StoreStateCode	picklist	Store State Code
StoreStreet	string	Store Street
Tax	double	Tax
TotalShippingCost	double	Total Shipping Cost
Vendor	string	Vendor
VendorCode	picklist	Vendor Code
VendorId	string	Vendor Id
VendorName	string	Vendor Name
WarehouseAddress	address	Warehouse Address
WarehouseCity	string	Warehouse City
WarehouseCountry	string	Warehouse Country
WarehouseCountryCode	picklist	Warehouse Country Code
WarehouseLatitude	double	Warehouse Latitude
WarehouseLongitude	double	Warehouse Longitude



WarehousePostalCode	string	Warehouse Postal Code
WarehouseState	string	Warehouse State
WarehouseStateCode	picklist	Warehouse State Code
WarehouseStreet	string	Warehouse Street
WorkOrderId	reference	Reference to the work order ID
WorkOrderItemId	reference	Reference to the work order item ID

WorkOrder

An internal (i.e., service-provider-facing) representation of the customer order to aid in tracking, distribution and fulfillment of order activities

AccountId	reference	Reference to the customer account
AssignedById	reference	Reference to party assigning this work order
AssignedtoId	reference	Reference to the party to which this work order was assigned
AssignedDate	date	Date the work order was assigned
CompanyAuthorizedById	reference	The company authorizing the work order
CompanyAuthorizedDate	date	Date the company authorized the work order
ContactId	reference	Reference to the customer contact
ContractId	reference	Reference to the customer contract to which this work order might be a subject
Created	date	Date work order was created
CreatedById	reference	The user who created the work order
CustomerAuthorizedById	reference	The customer authorizing the work order
CustomerAuthorizedDate	date	Date the company authorized the work order
Description	text area	Work order description
EffectiveDate	date	Effective date of the work order
EndDate	date	End date of the work order
ExternalId	string	ID used/assigned by an external system
IsAdditionOrder	boolean	Indicates an additional order if true
IsCancellationOrder	boolean	Indicates a cancellation order if true
IsChangeOrder	boolean	Indicates a change order if true
IsMoveOrder	boolean	Indicates a move order if true
IsReductionOrder	boolean	Indicates a reduction order if true



LastReferencedDate	date	Last reference date
LastViewedDate	date	Last record view date
Modified	date	Last modified date
ModifiedById	reference	Last modified by
Name	string	Work order name
OderId	reference	Reference to the order requiring this work order
OrderItemId	reference	Reference to the specific order item requiring this work order
OrderReferenceNumber	string	Reference number of the order requiring this work order
OriginalWorkOrderId	reference	Reference to the original work order in case this is a MACD work order
Status	picklist	Work order status
StatusCode	picklist	Work order status code
WorkOrderNumber	string	Work order number
WorkOrderPriority	picklist	Work order priority
WorkOrderVersion	string	Work order version

WorkOrderItem**A breakdown of the WorkOrder based on individual order activities and/or fulfillment steps, including systems and organizations**

ActivityCategory	picklist	Activity category (e.g., installation)
ActivityDependsOn	reference	Reference to the another work order item to which this activity depends
ActivityDescription	text area	Activity description
ActivityEndTime	datetime	Work item end date and time
ActivityName	string	Name of the specific activity
ActivityNotes	textarea	Activity notes
ActivityPriority	picklist	Activity priority
ActivityScheduledFor	date	Indicates the scheduled date of activity
ActivityScheduledWindow	picklist	Time window during which the scheduled activity will start
ActivityStartTime	datetime	Work item start date and time
ActualCompletionDate	datetime	Date and time the activity was actually completed
AssignedById	reference	The person assigning the work order activity
AssignedToId	reference	Assigned to the person performing the work



AssignDate	date	Date the work order item was assigned to an owner (AssignedTo)
Created	date	Date the record was created
CreatedById	reference	Created by user/account
Description	textarea	Description of the activity
ExternalId	reference	Id set/used by an external system
ExpectedCompletionDate	date	Expected completion date for the activity
IsClosed	boolean	Indicates record is closed
IsDeleted	boolean	Indicates record is marked for archiving or deletion
LastActivityDate	date	Last activity date
LastReferencedDate	date	Last reference date
LastViewedDate	date	Last record view date
Modified	date	Last modified date
ModifiedById	reference	Last modified by
OrderId	reference	Reference to the order by id upon which this activity depends
OrderItemId	reference	Reference to the order item by id upon which this activity depends
PremisesId	reference	Premises where the work will be performed
ProjectId	string	Customer project id
Status	picklist	Status of this work order item
WorkOrderId	reference	Reference to the work order for this work order
WorkOrderItemId	reference	Reference to the activity by id that this activity depends on



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