

salesforce

Financial Services Cloud Implementation Guide

Salesforce, Spring '16



 @salesforcedocs

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FINANCIAL SERVICES CLOUD

Financial Services Cloud is the platform designed for high-touch client relationship management. Empower your advisors to deliver the personalized, proactive service that clients expect. Accelerate advisor productivity with technology that helps them engage with clients like never before, and build deeper, lasting, more profitable relationships.

We've done the hard part. Your advisors get the tools that let them focus on high-value client activities instead of routine, administrative tasks. As an admin, you get the trusted power, security, and scalability of the Salesforce platform—tailored for advisory firms to streamline implementation. Install the Financial Services Cloud managed package and the unmanaged extension package.

Connect data from your portfolio management, financial planning, and other systems of record. And then configure the app to suit how your advisors like to work.

EDITIONS

Available in Lightning Experience for an extra cost in: **Enterprise** and **Unlimited** Editions

Considerations for Designing Your Implementation

Before you start implementation, plan ahead to make the transition easier for your advisory teams, partners, and clients. To help ensure successful rollout and adoption, determine how you want to support client interactions and services.

We recommend implementation in a new Salesforce org—rather than in an existing org with production data. We assume that you're working with an implementation partner who is assisting with systems integration, business process design, and advanced customizations.

- Review the out-of-the-box capabilities and compare them to your current needs. How do you want to change default configurations? Evaluate modifications to fields, picklists, layouts, and everything else that's required to support your business processes.
- Plan for integrations with transactional systems, external data sources, custodians, and any other platforms that your business relies on.
- Beyond the pre-configured settings, evaluate whether you need advanced customizations.
- Estimate the size of your user base and determine your licensing requirements.
- Determine if any limits or limitations affect your implementation.

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SEE ALSO:

[Feature Availability and Limitations](#)

A New Way of Working—in Lightning Experience

Your advisors are going to be working in Lightning Experience—the freshly redesigned user experience for Salesforce apps. Financial Services Cloud is one of the first apps to be built exclusively for Lightning. The app uses Lightning Components that are supported in Lightning only—not in Salesforce Classic, the user experience that predates Lightning.

 **Tip:** If you're new to Lightning Experience, get oriented quickly and earn some fun Trailhead badges by completing the Admin Trail, Starting with Lightning Experience.

EDITIONS

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You can complete nearly all tasks described in this guide using Setup tools in Lightning Experience. If you're required to switch to Salesforce Classic for a specific task, go to your profile photo in the header and switch. When you're ready to return to Lightning, select your name in the header and switch back.

While Lightning Components aren't editable because they're part of the managed package's Lightning Component bundle, you can view which components come in the bundle. From Setup, enter *Lightning Components* in the **Quick Find** box, then select **Lightning Components**.



Note: We don't recommend using the App Launcher in Lightning Experience to access Financial Services Cloud.

THE SALESFORCE DATA MODEL FOR FINANCIAL SERVICES CLOUD

Learn how we've adapted the Salesforce data model to create a foundation for industries that require a structured, flexible B2C data model. New custom fields on the Account and Contact standard objects let us model an individual client. New custom objects let us model client financials, household relationships, and more.

[Data Model Overview](#)

Learn about the objects and relationships that represent an individual person within the Financial Services Cloud data model.

[Tools for Getting Oriented to the Data Model](#)

For reviewing the objects that come with Financial Services Cloud, you have choices. You can use Schema Builder, the data model viewing tool, along with the Object Manager, and the Enterprise WSDL.

[How Is an Individual Client Modeled?](#)

We represent a client using a combination of the standard Account and Contact objects, coupled in what we call a *unified object view* of an individual person. We've extended these objects with custom fields, records types, and more.

[How Are a Client's Financial Accounts Modeled?](#)

Custom objects represent individual clients' financial accounts and the parties involved with their financial accounts. These objects are related to the account part of the individual.

[How Are a Client's Other Assets, Liabilities, and Goals Modeled?](#)

Custom objects represent individual clients' other assets, liabilities, and goals. These objects are related to the account part of the individual.

[How Is a Household Modeled?](#)

A household represents a group of clients who live together and whose financials are summarized at the household level. A household is an account with the Household record type. The household is related to the contact part of the individual using the Account Contact Relationship standard object, which we've extended with custom fields.

[Does the Data Model Implement a Party Model?](#)

We support the concepts of party and party relationships. We don't currently support the concept of party role. If a person was originally created as a business contact and later becomes a client (account and contact coupled), the contact and client remain as two separate entities. We don't recognize that both entities represent the same individual in distinct roles. Nor do we support deduplicating or merging of both sets of data for the same individual.

EDITIONS

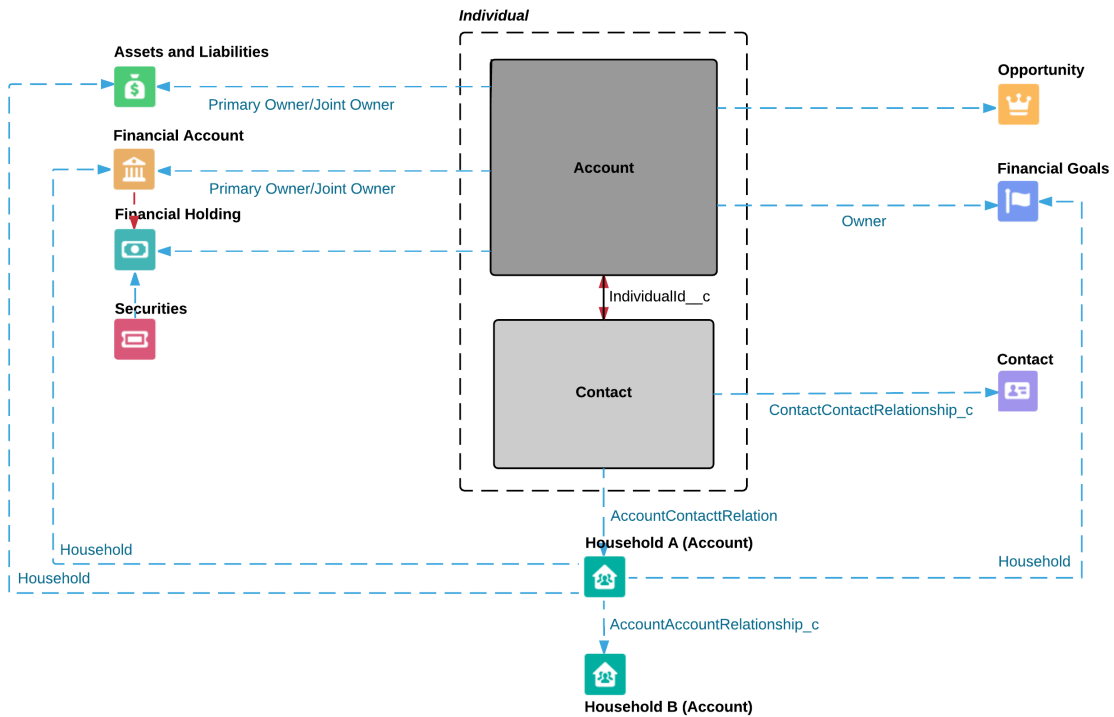
Available in Lightning Experience for an extra cost in: **Enterprise** and **Unlimited** Editions

Data Model Overview

Learn about the objects and relationships that represent an individual person within the Financial Services Cloud data model.

EDITIONS

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Tools for Getting Oriented to the Data Model

For reviewing the objects that come with Financial Services Cloud, you have choices. You can use Schema Builder, the data model viewing tool, along with the Object Manager, and the Enterprise WSDL.

From Setup, enter either *Object Manager*, *Schema Builder*, or *API* in the Quick Find box. Then select either **Object Manager**, **Schema Builder**, or **API**. You can also use a describe call from the API to see the complete list of fields for an object.

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How Is an Individual Client Modeled?

We represent a client using a combination of the standard Account and Contact objects, coupled in what we call a *unified object view* of an individual person. We've extended these objects with custom fields, records types, and more.

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Object	Standard or Custom	Purpose	Record Types
Account	Standard	<ul style="list-style-type: none"> Represents aspects of the client that pertain to their dealings with your firm, such as their 	Individual

Object	Standard or Custom	Purpose	Record Types
		review frequency or service tier. <ul style="list-style-type: none"> Is related to opportunities, cases, and other Salesforce transactions. 	
Contact	Standard	<ul style="list-style-type: none"> Represents aspects of the client that pertain to their personhood irrespective of their relationship with your firm, such as their birthdate or tax ID number. Is related to events, tasks, calls, and other Salesforce communications. 	Individual

When you create an individual client, Salesforce creates both an account record and a contact record that are related by the custom field, Individual ID. This custom field on both Account and Contact lets us reference the individual with a single ID.

Usually, the unified object view means that clients appear in Salesforce as a person—not as separate account and contact records. But not always. The structure under the hood sometimes surfaces in an account-only context or a contact-only context, such as in list views of accounts or contacts. In global search results, it can appear as though one individual is a duplicate account and contact. Keep this structure in mind as you help your advisors get accustomed to working in Financial Services Cloud.

How Are a Client’s Financial Accounts Modeled?

Custom objects represent individual clients' financial accounts and the parties involved with their financial accounts. These objects are related to the account part of the individual.

Object	Standard or Custom	Represents	Record Types
Financial Account	Custom	A client’s financial account, such as a brokerage account, bank account, or insurance policy.	<ul style="list-style-type: none"> Bank Account General Account Investment Account Insurance Policy
Financial Account Role	Custom	The role occupied by a person or organizational entity that is involved with a financial account, such	<ul style="list-style-type: none"> Account Role Contact Role

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Object	Standard or Custom	Represents	Record Types
			as a beneficiary or trustee.
Financial Holding	Custom	A holding in an investment account, such as 10,000 shares of Salesforce (CRM).	
Securities	Custom	An asset that is part of a client’s financial holding, such as a stock.	

How Are a Client’s Other Assets, Liabilities, and Goals Modeled?

Custom objects represent individual clients' other assets, liabilities, and goals. These objects are related to the account part of the individual.

Object	Standard or Custom	Represents	Record Types
Assets and Liabilities	Custom	A client’s assets, such as real estate or collectibles, and liabilities, such as a mortgage, that are not otherwise represented in their financial accounts.	<ul style="list-style-type: none"> • Asset • Liability
Financial Goals	Custom	A client’s financial goal, such as retirement or home purchase.	

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How Is a Household Modeled?


A household represents a group of clients who live together and whose financials are summarized at the household level. A household is an account with the Household record type. The household is related to the contact part of the individual using the Account Contact Relationship standard object, which we’ve extended with custom fields.

We can also relate individual household members to external contacts, and relate a household to external contacts and accounts. Custom objects represent relationships with other professional advisors, business entities, and other households.

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Object	Standard or Custom	Represents	Record Types
Account	Standard	The household entity.	Household
Account-Account Relationship	Custom	The relationship between two accounts, such as between a	

Object	Standard or Custom	Represents	Record Types
		household and a business account, or between two households.	
Account Contact Relationship	Standard	<p>The relationship between the contact part of an individual and the household that the individual belongs to.</p> <p> Note: The Account Contact Relationship object is available via the Shared Contacts feature. It isn't visible in Object Manager in Lightning Experience. Switch to Salesforce Classic to view this object.</p>	
Contact-Contact Relationship	Custom	The relationship between the contact part of the individual and a business contact.	
Reciprocal Role	Custom	Represents the complementary role implied by the relationship of an individual to another individual or entity. For example, Proprietor and Owned Business.	

Does the Data Model Implement a Party Model?

We support the concepts of party and party relationships. We don't currently support the concept of party role. If a person was originally created as a business contact and later becomes a client (account and contact coupled), the contact and client remain as two separate entities. We don't recognize that both entities represent the same individual in distinct roles. Nor do we support deduplicating or merging of both sets of data for the same individual.

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PRE-INSTALLATION TASKS

In the org where you plan to install Financial Services Cloud, first perform these prerequisite tasks.

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Verify That Shared Contacts Is Enabled

The Shared Contacts feature must be enabled to support the Financial Services Cloud data model.

1. From Setup, enter *Accounts* in the *Quick Find* box.
2. Verify that the Setup menu under **Accounts** includes **Contact Roles on Accounts** and **Contact Relationships**.
If you see these items, then Shared Contacts is enabled.
3. If you don't see these items, enter *Account Settings* in the *Quick Find* box, then select **Account Settings**.
4. If *Enable Sharing Contacts with Multiple Accounts* is not selected, enable it.
If it is selected, try disabling it, and then re-enabling it.
5. Then check the Setup menu again for the missing items.

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Verify That Chatter Is Enabled

Chatter must be enabled before you install Financial Services Cloud.

1. From Setup, enter *Chatter* in the *Quick Find* box, then select **Chatter Settings**.
2. Verify that *Enable* is selected under Chatter Settings.

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Create an Advisor User Profile

Create a profile for advisors by cloning the Standard User profile. This cloned profile becomes the baseline that grants advisors access to Financial Services Cloud features.

When you install the Financial Services Cloud packages, you're required to map this cloned profile to the Advisor custom profile that's provided in each package.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. **Clone** the Standard User profile.

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3. Give it a name, such as *Advisor*.
4. Save your changes.

Register a Custom Domain Name

Register a custom domain name and deploy it in your org. My Domain must be enabled to support the use of Lightning Components.

1. From Setup, enter *My Domain* in the `Quick Find` box, then select **My Domain**.

2. Enter the subdomain name you want to use within the sample URL.

The subdomain appears in your firm's login URL as

`https://subdomain.my.salesforce.com/`. It can't contain these reserved words:

- `www`
- `salesforce`
- `heroku`

And, you can't start the domain name with:

- `root`
- `status`

3. Select **Check Availability**. If your name is already taken, choose a different one.
4. Select **Terms and Conditions** to review your agreement, then select the checkbox.
5. Select **Register Domain**.

You can refresh to page to check the registration status, or wait for the confirmation email. It can take from 30 seconds to 24 hours.

After registration is confirmed, your domain is ready for testing and deployment.

6. Select **Click here to login**.
7. (Optional) Continue with mobile phone registration.
8. If you land on the Salesforce home page, return to **My Domain** in Setup.
9. Select **Deploy to Users**.

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FINANCIAL SERVICES CLOUD PACKAGES

Financial Services Cloud functionality is available via two packages. The managed package delivers most of the features, while the unmanaged extension package delivers field sets.

[Install the Managed Package](#)

The managed package contains most of the functionality, including custom fields and objects, list views and profiles of clients and households, and administrative configurations. Install it from the AppExchange.

[Install the Unmanaged Extension Package](#)

The unmanaged extension package delivers field sets that configure the display of fields within the client and household profiles. After you've installed the managed package, install the unmanaged package.

EDITIONS

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Install the Managed Package

The managed package contains most of the functionality, including custom fields and objects, list views and profiles of clients and households, and administrative configurations. Install it from the AppExchange.

1. Paste the URL for the managed package into your browser navigation bar and press **Enter**.
2. Enter the password you received from Salesforce.
3. Select **Install for Specific Profiles...**
4. Scroll down to the Advisor profile. Set the Access Level to *Advisor*.

This step maps the cloned profile that you created (as a pre-installation task) to the Advisor profile provided in the package.

5. Select **Install**.

If it takes a while, you can select **Done** and move on to do something else while installation finishes. Check your email for confirmation that installation was successful.

6. Verify installation of the managed package.
 - a. From Setup, enter *Installed Packages* in the *Quick Find* box, then select **Installed Packages**.
 - b. Look for Financial Services Cloud.

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Install the Unmanaged Extension Package

The unmanaged extension package delivers field sets that configure the display of fields within the client and household profiles. After you've installed the managed package, install the unmanaged package.

1. Paste the URL for the unmanaged package into your browser navigation bar and press **Enter**.
2. Enter the password you received from Salesforce.
3. Select **Install for Specific Profiles...**

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4. Scroll down to the Advisor profile. Set the Access Level to *Full Access*.

This step maps the cloned profile that you created (as a pre-installation task) to the Advisor profile provided in the package.

5. Select **Install**.

If it takes a while, you can select **Done** and move on to do something else while installation finishes. Check your email for confirmation that installation was successful.

6. Verify installation of the unmanaged package.

- a. From Setup, enter *Installed Packages* in the *Quick Find* box, then select **Installed Packages**.

- b. Look for Financial Services Cloud Ext.

POST-INSTALLATION TASKS

After you've installed both packages, continue with these setup and configuration tasks.

Verify That Custom Settings Are Enabled

Make sure that the Industries Application Config custom setting is enabled.

1. From Setup, enter *Custom Settings* in the **Quick Find** box, then select **Custom Settings**.
2. Select **Manage** next to Industries Application Config.
3. Verify that the Default Organization Level Value is set to Salesforce and the Wealth application.

Verify Tab Visibility in Profiles

Make sure that Financial Services Cloud custom tabs are visible for the Advisor profile.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Select the Advisor profile.
3. Verify that the custom tab settings are set to *Default On* for at least the Home, Clients, and Households custom tabs.
Change the tab settings to *Default On* if needed.

Enable Notes (Optional)

Accelerate users' productivity by giving them access to Notes, the enhanced note-taking tool. We recommend enabling this supporting feature before you enable Lightning Experience.

1. Enable Notes.
 - a. From Setup, select **Lightning Experience**.
 - b. Select **Set Up Notes**.
 - c. Select **Edit Notes Settings**.
 - d. Select **Enable Notes**.
 - e. Save your changes.
2. Make sure that the Notes related list is included on your page layouts.

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3. Make sure that users can take notes from the Chatter publisher, the Global Actions menu, and the Salesforce1 action bar. Verify that the global publisher layout includes the **New Note** quick action in the Salesforce Classic Publisher and Salesforce1 and Lightning Experience Actions sections.


SEE ALSO:

[Enable Lightning Experience](#)

Enable Lightning Experience

Lightning Experience must be enabled because Financial Services Cloud is supported only in Lightning Experience.

1. From Setup, select **Lightning Experience**.
2. Review and consider enabling the recommended supporting features before you enable Lightning Experience.

 **Important:** Duplicate Management is not supported with Financial Services Cloud. We don't recommend enabling this feature.

3. Select the **Lightning Experience** toggle to enable.

SEE ALSO:

[Enable Notes \(Optional\)](#)

EDITIONS

Available in Lightning Experience for an extra cost in: **Enterprise** and **Unlimited** Editions

Set Up the Lightning Experience Navigation Menu

Advisors access objects and records using the Lightning Experience navigation menu. Create a navigation menu with items conveniently ordered and specify the user profiles that get this menu.

1. From Setup (in Lightning Experience only), enter *Navigation* in the *Quick Find* box, then select **Navigation Menus**.
2. Select **New**.
3. Enter a name, such as *Financial Services Cloud*.
4. Next, drag available items to the Navigation Menu Items list and order them with the most-used items at the top—typically Home, Clients, and Households.

 **Tip:** For the Home page item, select the one that has been customized for Financial Services Cloud (). You don't need the other Home item (.

We recommend items in this order:

- Home
- Clients
- Households
- Feed
- Tasks
- Notes

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- Calendar
- Dashboards
- Opportunities
- Leads
- Accounts
- Contacts
- Reports
- Files
- People
- Groups
- Financial Accounts
- Assets and Liabilities
- Financial Holdings
- Financial Goals
- Securities
- Reciprocal Roles

5. Next, assign the menu to the Advisor profile and other profiles as needed.

6. Save your changes.



Note: The items for Home, Clients, and Households don't have corresponding tabs in Salesforce Classic. Other Financial Services Cloud items, such as Financial Accounts and Financial Goals, do.

Modify the Salesforce1 Navigation Menu (Optional)

Modify the items available in the Salesforce1 mobile navigation menu to ensure that advisors don't inadvertently access client and household profiles on their mobile devices. Even though Financial Services Cloud isn't fully supported in Salesforce1, you can still ensure mobile access to tasks, events, notes, and other essential productivity tools.

1. From Setup, enter *Salesforce1 Navigation* in the **Quick Find** box, then select **Salesforce1 Navigation**.
2. Ensure that only supported items are included in the Selected menu items list.

We recommend:

- Tasks
- Notes
- Events
- Dashboards
- Reports
- Feed
- People
- Groups
- Smart Search

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3. Save your changes.

Configure Action Overrides to Redirect Navigation to Client and Household Profiles

Standard URLs in the user interface that ordinarily point to account and contact detail pages require a different navigation path for client information. When advisors interact with detail page links, you want them to navigate to a client or household profile—not the client’s account or contact record. Configure action overrides to redirect these URLs.

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1. Configure an action override for account detail pages.
 - a. From the management settings for Accounts, go to **Buttons, Links, and Actions**.
 - b. Select **Edit** next to View.
 - c. Override the view action with Visualforce Page, and then select *AccountDetailRedirect [FinServ_AccountDetailRedirect]* from the drop-down list.
 - d. Save your changes.
2. Configure an action override for contact detail pages.
 - a. From the management settings for Contacts, go to **Buttons, Links, and Actions**.
 - b. Select **Edit** next to View.
 - c. Override the view action with Visualforce Page, and then select *ContactDetailRedirect [FinServ_ContactDetailRedirect]* from the drop-down list.
 - d. Save your changes.

Add Activity Actions to Account and Contact Page Layouts

Enable actions on account and contact page layouts so that advisors can work with tasks and events, send email, and log calls on record detail pages.

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1. Add the Send Email action to the Contact (Individual) Layout.
 - a. From the management settings for Contacts, go to **Page Layouts**.
 - b. Select **Edit** next to Contact (Individual) Layout.
 - c. Select the **Salesforce1 Actions** category in the palette, and then drag **Send Email** to the Salesforce1 and Lightning Experience Actions section.
 - d. Save your changes.
2. Add task, event, and call actions to the Account Layout.
 - a. From the management settings for Accounts, go to **Page Layouts**.
 - b. Select **Edit** next to Account Layout.
 - c. Select the override option in the Salesforce1 and Lightning Experience Actions section.
 - d. Select the **Salesforce1 Actions** category in the palette, and then drag these actions to the Salesforce1 and Lightning Experience Actions section.

- **New Task** (Advisor)
 - **New Task** (Client Associate)
 - **New Event** (Advisor)
 - **New Event** (Client Associate)
 - **Log a Call** (Advisor)
 - **Log a Call** (Client Associate)
- e. Save your changes.

Add Actions to Custom Object Page Layouts (Optional)

Enable clone, delete, and edit actions for Financial Services Cloud custom objects so that advisors can access them on record detail pages in Lightning Experience.

1. From the management settings for each custom object whose actions you want to manage, such as Financial Accounts, go to **Page Layouts**.
2. Select **Edit** next to each page layout you want to add actions to.
3. Select the **Salesforce1 Actions** category in the palette, and then drag these actions to the Salesforce1 and Lightning Experience Actions section.
 - **Clone**
 - **Delete**
 - **Edit**
4. Save your changes.
5. Repeat these steps for each custom objects page layout, as needed.

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Verify Page Layout Assignments

Verify that page layouts are set up for contacts, tasks, and events, so that your advisors can access the appropriate layouts on client and household profiles.

1. Verify page layout assignments for contacts.
 - a. From the management settings for Contacts, go to **Page Layouts**.
 - b. Select **Page Layout Assignment**.
 - c. Verify that the Advisor profile has the Contact (Individual) Layout assigned for the Individual record type.
 - d. If it's not already assigned, select **Edit Assignment**.
 - e. Choose *Contact (Individual) Layout* from the drop-down list.
 - f. In the table, select the cell for the Advisor profile and Individual record type. If other profiles need this layout assigned as well, select them now.
 - g. Save your changes.
2. Verify page layout assignments for tasks.

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- a. From the management settings for Tasks, go to **Task Page Layouts**.
 - b. Select **Page Layout Assignment**.
 - c. Verify that the Advisor profile has the Wealth Tasks layout assigned for the Advisor Task record type.
 - d. If it's not already assigned, select **Edit Assignment**.
 - e. Choose *Wealth Tasks* from the drop-down list.
 - f. In the table, select the cell for the Advisor profile and Advisor Task record type.
If other profiles need this layout assigned as well, select them now.
 - g. Save your changes.
3. Verify page layout assignments for events.
 - a. From the management settings for Activities, go to **Event Page Layouts**.
 - b. Select **Page Layout Assignment**.
 - c. Verify that the Advisor profile has the Wealth Events layout assigned for the Advisor Event record type.
 - d. If it's not already assigned, select **Edit Assignment**.
 - e. Choose *Wealth Events* from the drop-down list.
 - f. In the table, select the cell for the Advisor profile and Advisor Event record type.
If other profiles need this layout assigned as well, select them now.
 - g. Save your changes.

Enable Advisor Profile Permissions

Enable required permissions and a field-level security setting for the Advisor profile. Also enable them as required for the System Administrator profile.

Financial Services Cloud provides both an Advisor profile and an Advisor Access permission set. You can edit the Advisor profile because you created it and mapped it to the Advisor profile that we provide. You can't edit the Advisor Access permission set. However, you can clone it and add or remove permissions as needed. (From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.) Adapt the implementation steps involving the Advisor profile to the Advisor Access permission set as needed.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Select the Advisor profile.
3. Enable these permissions.
 - Drag-and-Drop Dashboard Builder
 - Edit Case Comments
 - Import Leads
 - Manage Cases
 - Manage Leads
 - Transfer Cases
 - Transfer Leads
 - View My Team's Dashboards

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- View Reports in Public Folders
 - View Dashboards in Public Folders
4. For both the Advisor and System Administrator profiles, set field permissions for the Type field in the Task object. Depending on which interface you're using, do one of the following:
 - Permission sets or enhanced profile user interface—In the `Find Settings...` box, enter `Task` and select **Tasks** from the list. Edit the task and enable Read and Edit for the `Type` field.
 - Original profile user interface—In the Field-Level Security section, select **View** next to Task. Edit the task and make the `Type` field visible.
 5. For both the Advisor and System Administrator profiles, verify the record type settings for these objects.
 - Events default to `Advisor Event`
 - Tasks default to `Advisor Task`

Create a User with the Advisor Profile

Create a user, assign it the Advisor profile, and verify that you can view the app when logged in as an advisor.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Create a user. Assign it the `Salesforce` user license and the `Advisor` profile.
3. Save your changes.
4. Log in as the new user and confirm that you start on the Home landing page.

EDITIONS

Available in Lightning Experience for an extra cost in: **Enterprise** and **Unlimited** Editions


Review Profile Assignments in the Custom App (Optional)

When Financial Services Cloud is enabled, the Advisor and System Administrator profiles are assigned the Financial Services Cloud custom app. Review how these profiles are configured in the custom app.

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
2. To view details of how the custom app is configured, select **Edit** next to Financial Services Cloud.
You're not required to change any of these custom app configurations. Simply review how the custom app is assigned to the Advisor and System Administrator profiles.

EDITIONS

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-  **Note:** Besides the setting that controls the app's visibility to profiles, you can ignore the other settings on this page. They apply only when a user views the app in Salesforce Classic. They don't affect visibility of Financial Services Cloud pages, which can be viewed in Lightning Experience only.

Configure Client Roles

When advisors create a client record, they specify the client’s role within the household. For example, client, spouse, domestic partner, or dependent. These roles are picklist values for the Role field on the Account Contact Relationship object. Define roles that represent the types of household members that your firm tracks.

1. From Setup (in Salesforce Classic only), enter *Contact Relationships* in the Quick Find box, then select **Fields** under Contact Relationships.
2. Select Roles.
3. Delete the standard Salesforce roles and add roles as needed.

We recommend these roles:

- Client
- Dependent
- Domestic Partner
- Spouse
- Other

4. Save your changes.

EDITIONS

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Configure Reciprocal Roles (Optional)

Within a relationship, each entity occupies a *reciprocal role* relative to the other entity. For example, Client and Power of Attorney, or Proprietor and Business. We’ve provided a starter set of commonly used reciprocal role records. You can edit them to specify more granular roles for extended family, specific types of attorneys, or various professional affiliations.

Use reciprocal roles to describe how business contacts and accounts are related to clients and households.

1. Switch to Salesforce Classic and go to the Reciprocal Roles tab.

 **Tip:** If it’s not visible in the tab bar, select the All Tabs icon to show the full list of available tabs.

2. In the View: drop-down list, make sure *ALL* is selected, and then select *Go!*.
3. Review the default reciprocal roles and edit them as needed.

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Role	Inverse
Accountant	Client
Lawyer	Client
Parent	Dependent
Dependent	Parent
Ex-Spouse	Ex-Spouse
Grandparent	Grandchild

Role	Inverse
Grandchild	Grandparent
Power of Attorney	Client
Extended Family	Extended Family
Business	Proprietor

Configure Batch Processing of Last and Next Interaction Dates

Last and Next Interaction dates are refreshed automatically at a specified schedule via a batch job. Configure the batch job from the Developer Console.

1. From the Salesforce header, open the Developer Console.
2. Select **Debug > Open Execute Anonymous Window**.
3. Enter this code in the Enter Apex Code window.

```
DateTime runTime = DateTime.now().addMinutes(1);
System.schedule('Process Interactions Job',
  FinServ.ContactInteractionSchedulable.getCronString(runTime), new
  FinServ.ContactInteractionSchedulable());
```

4. Execute the code and then review the debug log.

EDITIONS

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Configure Dashboard Components

The packaged dashboards contain components that require configuration before they're ready for use.

1. Configure the Clients by Wallet Share component.
 - a. Go to the Dashboards list and select the My Book of Business - Overview dashboard (in the Public Dashboards folder).
 - b. Select **Edit**, and then select the Edit Attributes icon on the Clients by Wallet Share component.
 - c. Set `Decimal Places` to `0` and select `Display as Percentage (%)`.
 - d. Select **OK** and save your changes to the dashboard.
2. Configure the Closed Opportunities by Source component.
 - a. Go to the Reports list and select the Closed Opportunities by Source report (in the Advisor Reports folder).
 - b. Select **Customize**.
 - c. Add the Marketing Segment field to the report. Set the primary grouping to Lead Source and the secondary grouping to Marketing Segment.
 - d. Save your changes to the report.
 - e. Verify that this component displays data in the My Book of Business - Sales & Opportunities dashboard.

EDITIONS

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DEFAULT CONFIGURATIONS

Dashboard Defaults

Packaged dashboards help your advisors monitor their engagements with existing clients, spot trends, and identify opportunities to bring in more business.

The default dashboards are based on the underlying reports in the Advisor Reports folder. They're also based on these custom report types.

- Clients - Dashboards
- Households - Dashboards

If you want to customize any packaged dashboard, we recommend that you clone an existing dashboard rather than modifying it directly. We also recommend that you edit dashboards in Salesforce Classic only, because of limitations when using dashboards in Lightning Experience.

SEE ALSO:

[Report Defaults for Clients and Household List Views](#)

EDITIONS

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Report Defaults for Clients and Household List Views

The fields displayed in the default list views of Clients and Households depend on the underlying reports and specific custom report types. Feel free to edit these default report objects but be careful to not delete them.

Access reports in the Reports tab. To access report types, from Setup, enter *Report Types* in the **Quick Find** box, then select **Report Types**.


Client reports are stored in the Client Reports folder (in the Other Reports category). My Clients is the underlying report for the default Clients list view.

Household reports are stored in the Household Reports folder (in the Other Reports category). My Households is the underlying report for the default Households list view.

Client and household reports are based on custom report types: Clients and Households. The custom report types have Accounts as the primary object and include only accounts that have at least one related record from Contacts. They include all relevant standard fields from the Account and Contact objects, and all custom fields that are provided with Financial Services Cloud.

Default list views include predefined filters—defined in the underlying reports—so that advisors can quickly drill into their book of business to create actionable lists. For example, filter by:

- Age group
- Birthdate
- Total financial account value
- Next or last interaction date

 **Note:** Only administrators can edit or create reports in the Client Reports and Household Reports folders. And only reports in these specific folders are accessible in the Clients and Households list views. Nothing prevents advisors from cloning existing

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reports, saving them in other folders, and modifying the report filters. However, reports saved in other folders aren't accessible from the Clients and Households list views.

If you want to add custom fields to list views that aren't in the Clients or Households custom report types, you can. Clone the appropriate report type, keep the Report Type Name the same, and add your custom fields.


SEE ALSO:

[Dashboard Defaults](#)

Customize Clients and Households List Views

Customize the default reports to give advisors easy access to frequently accessed Clients and Households list views. For example, create lists of clients filtered by age or upcoming birthdays. Start with the default Clients or Households report and edit the filters and fields.

1. In the navigation menu, go to the Reports list view, and then select **All Folders**.
2. Select the *Client Reports* or *Household Reports* folder.
3. Select the *My Clients* or *My Households* report.
4. Edit the report so that it shows the fields and filters most useful to your advisors, and then save the report with a new, descriptive name. Or you can clone the existing My Clients or My Households report and edit the cloned report.

 **Important:** Make sure that the Client Reports folder contains only client-related reports, and that the Household Reports folder contains only household-related reports. If you save any other types of reports in these folders, users can't access them in the Clients or Households lists. The reports are visible in the list view menu but accessible only from the Reports page.

In the Clients or Households list view, the newly added report becomes available as a list view.

 **Note:** Users can select from a maximum of 1,000 list views in the drop-down list at the top of the page.

If you want to add custom fields to list views that aren't in the Clients or Households custom report types, you can. Simply clone either of the report types, keep the Report Type Name the same, and add your custom fields.

Client Address Defaults

Four addresses are supported per client: permanent, mailing, seasonal, and one other address. Users can designate one of them as primary. Addresses aren't supported at the household level.

Here's how we use address fields from the account and contact parts of the individual.

Object	Address Fields	Used As
Account	Mailing	Mailing
Account	Other	Other
Contact	Billing	Permanent
Contact	Shipping	Seasonal

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Custom Tabs' Name Defaults

For Home, Clients, and Households, the tab names and labels aren't editable. For other Financial Services Cloud custom objects, you can edit tab names and labels.

From Setup, enter *Tabs* in the *Quick Find* box, then select **Rename Tabs and Labels**.

If you rename any tabs, remember to update any custom reports, views, or other items that rely on the original name.

EDITIONS

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Custom Tabs' Icon Defaults

Some icons are considered Lightning Component Tabs built specifically for Financial Services Cloud, while others are considered Custom Object Tabs. Either way, you can edit the default tab icons.

From Setup, enter *Tabs* in the *Quick Find* box, then select **Tabs**.

Keep in mind that the icons' appearance in Setup shows how they appear in Salesforce Classic. They're styled differently in Lightning Experience. But rest assured that any icon changes that you make in Setup are automatically reflected in the Lightning Experience navigation menu and application pages.

EDITIONS

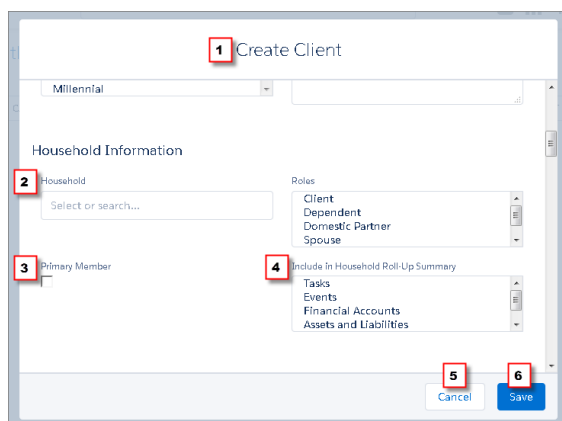
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Custom Label Configuration Defaults

Lightning components can display custom text values that are defined in custom labels. Custom labels—a standard Salesforce feature—define some of these field display values. On pages that use field sets, we also use a custom metadata type, CustomLabelConf, to override the text with custom labels when doing so improves clarity. Review the default custom labels and custom label configurations.

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For example, in the Create Client dialog box, the header (1) and the button labels (5) and (6) are custom labels. Some field labels in the Household Information section are custom label configurations that override the text of default labels.

- Household (2) overrides the Account ID field label.
- Primary Member (3) overrides the Member field label.

- Include in Household Roll-up Summary (4) overrides the Roll-Ups field label.

Get an overview of where both types of custom labels are used in the app. From Setup, enter *Custom Labels* in the **Quick Find** box, then select **Custom Labels**. Separately, from Setup, enter *Custom Metadata Types* in the **Quick Find** box, then select **Custom Metadata Types**. Select **Manage Records** next to CustomLabelConf.

Keep these things in mind.

- If you edit custom labels, make sure to enable Translation Workbench. From Setup, enter *Translation Workbench* in the **Quick Find** box, then select **Translation Workbench**.
- Do not rename or use translated custom labels, or else the labels don't display properly.
- The predefined labels don't count toward your organization's custom label limit.
- You can create custom label list views, with filter criteria, to more easily manage long lists of custom labels.

Client and Household Roll-Up Summary Defaults

Clients' financial accounts, assets, and liabilities are automatically totaled for each individual client, and multiple individuals' totals can be summarized at the household level. Review the default roll-up summaries and roll-up configurations to determine whether you want to change how roll-ups work.

Client Roll-Ups to Households

Advisors decide client-by-client which items to include in the household roll-up summary: financial accounts, goals, assets and liabilities, and Salesforce essentials such as tasks and events.

Client and Household Roll-Up Summaries by Lookup Fields

Roll-up summaries for individual clients' and households' financial accounts, assets, and liabilities are defined by the custom objects, Rollup By Lookup Config and Rollup By Lookup Filter Criteria. These objects enable calculation of roll-up summaries based on lookup field relationships between objects, rather than master-detail relationships. Customization of roll-up configurations isn't currently supported.

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Client Roll-Ups to Households

Advisors decide client-by-client which items to include in the household roll-up summary: financial accounts, goals, assets and liabilities, and Salesforce essentials such as tasks and events.

The screenshot shows the 'Create Client' form. At the top, there is a dropdown menu set to 'Millennial'. Below that is a search field for 'Household Information'. The form is divided into two main sections: 'Roles' and 'Include in Household Roll-Up Summary'. The 'Roles' section has a dropdown menu with options: Client, Dependent, Domestic Partner, and Spouse. The 'Include in Household Roll-Up Summary' section has a dropdown menu with options: Tasks, Events, Financial Accounts, and Assets and Liabilities. A red circle highlights the 'Tasks', 'Events', 'Financial Accounts', and 'Assets and Liabilities' options. At the bottom right, there are 'Cancel' and 'Save' buttons.

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In the Create Client dialog box, the `Include in Household Roll-Up Summary` field offers options for summarizing the client's information at the household level. The options correspond to picklist values in the Roll-Ups field on the Account Contact Relationship object. To view the default configurations for client roll-ups to households, from Setup (in Salesforce Classic only), enter `Contact Relationships` in the `Quick Find` box, then select **Fields** under Contact Relationships. Select the `Roll-Ups` field.

Client and Household Roll-Up Summaries by Lookup Fields

Roll-up summaries for individual clients' and households' financial accounts, assets, and liabilities are defined by the custom objects, Rollup By Lookup Config and Rollup By Lookup Filter Criteria. These objects enable calculation of roll-up summaries based on lookup field relationships between objects, rather than master-detail relationships. Customization of roll-up configurations isn't currently supported.

EDITIONS

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Control Automatic Account Creation from Contact for Individuals (Optional)

When your users create an individual record using the Create Contact dialog box, we automatically create an account record for the client, as well. If you've added custom required fields to the account part of the individual, consider disabling automatic creation of the account part of the individual. The default data entry flow when creating a contact doesn't enforce that users enter values for any extra required account fields.

1. From Setup, enter `Custom Settings` in the `Quick Find` box, then select **Custom Settings**.
2. Select **Manage** next to Industries Application Config.
3. Select **Edit** and then deselect `Individual Account Creation from Contact`.
4. Save your changes.



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SYSTEMS INTEGRATION

Guidelines for Salesforce for Outlook

If your firm uses Salesforce for Outlook, keep in mind these guidelines when syncing contacts, events, tasks, and email.

- Your users can create and sync contacts, events, and tasks in both directions.
- Client records created in Salesforce sync with Outlook in both directions.
-  **Note:** Creating client records in Outlook isn't currently supported.
- Using the Salesforce for Outlook side panel, your users can add emails, events, and tasks to clients. When emailing a client, users can add the email to the client record. When sending or receiving email about a client, users can associate the email with one or more of the clients involved. Associating clients with Outlook calendar events and Outlook tasks works similarly.
- Added emails, events, and tasks and are displayed in the Activity tab of the client profile.
- Emails, tasks, and events are associated with the contact part of the client record.
-  **Tip:** Sometimes, the side panel displays a client's name twice. The Add icon appears next to both, with no indication that one is the account record while the other is the contact record. Instruct your users to select the name on top, to properly associate the item with the contact part of the client.

EDITIONS

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Considerations for Integrating Data

Integrating data from custodians, financial planning, portfolio management, asset aggregation, and all the other platforms that support your front- to back-office is a major implementation task.

If you're uploading data using the Data Loader, APIs, or third-party integrations, check for structural integrity and consistency between systems.

- Maintain consistent naming conventions for the account and contact parts of individual clients.
- Prevent uploaded financial transaction data from overriding fields that are automatically calculated in Financial Services Cloud by default, which affects other fields or roll-up summaries.

EDITIONS

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Recommended Data Upload Sequence for Data Loader

Integrating data from custodians, financial planning, portfolio management, asset aggregation, and all the other platforms that support your front- to back-office is a major implementation task.

If you use Data Loader to bulk import data, we recommend a sequence for exporting and importing the initial objects.

We recommend this sequence for uploading client, household, and financial account data.

1. Clients
2. Households

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3. Clients' relationships to households

4. Financial accounts

Continue with the remaining data in any sequence, except where noted.

- Financial goals
- Assets and liabilities
- Securities followed by financial holdings
- Contact-contact relationships

FEATURE AVAILABILITY AND LIMITATIONS

Financial Services Cloud works differently from other Salesforce features in some ways. Learn about the issues to expect as you implement the app and as your advisors start to work in it.

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Supported Browsers

Financial Services Cloud is supported with: Microsoft® Internet Explorer® version 11; Apple® Safari® version 8.x on Mac OS X; Mozilla® Firefox®, most recent stable version; and Google Chrome™, most recent stable version; and Microsoft Edge®. There are some limitations.

- Microsoft Edge and Internet Explorer 11 aren't supported for the Developer Console.

Features Not Supported with Financial Services Cloud

- These features are not supported. We don't recommend enabling them in your org.
 - Duplicate Management
 - Salesforce Shield
 - Multiple currencies (Single currency is supported for any currencies that Salesforce supports.)
- Internationalization is not supported. User interface labels and product documentation is available in English only. Translated labels and documentation are not provided.
- Accessibility features haven't been incorporated.

Feature Limitations

- When users create or edit clients' household memberships, household roll-up summaries are updated automatically. There are some exceptions.
 - In the user interface, if a user changes the household that a client belongs to, household roll-up summary data is updated automatically. If household membership is updated via APIs, Data Loader, or other methods, roll-up summary data is not updated to reflect the change.
 - The user interface enforces a validation rule that a client can't be a member of multiple households. This validation rule doesn't apply to data uploads via APIs, Data Loader, or other methods. If a client is made a member of multiple households, household roll-up summary data is reflected for one household only.
- When users convert a lead and select a record type for the account to create, the only valid value is a Business account. Lead conversion is not supported for the Individual and Household account record types.
- Access to client and household profiles on the Salesforce1 mobile app is not fully supported.
- If Person Accounts is enabled, client-related features require additional configuration.
- Trusts, partnerships, and other asset ownership structures are not modeled explicitly. You can associate an individual or business contact with a financial account as a trustee. To represent assets held by a trust, we recommend this approach.
 - For a revocable trust, create a financial account record and indicate a trust in the name or in a custom field.

Feature Availability and Limitations

- For an irrevocable trust, create a client record (allows for tax ID assignment) and indicate a trust in the name or in a custom field.

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