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# Financial Services Cloud Implementation Guide

Salesforce, Summer '16





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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: **Professional**, **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.

## EDITIONS

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

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

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

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

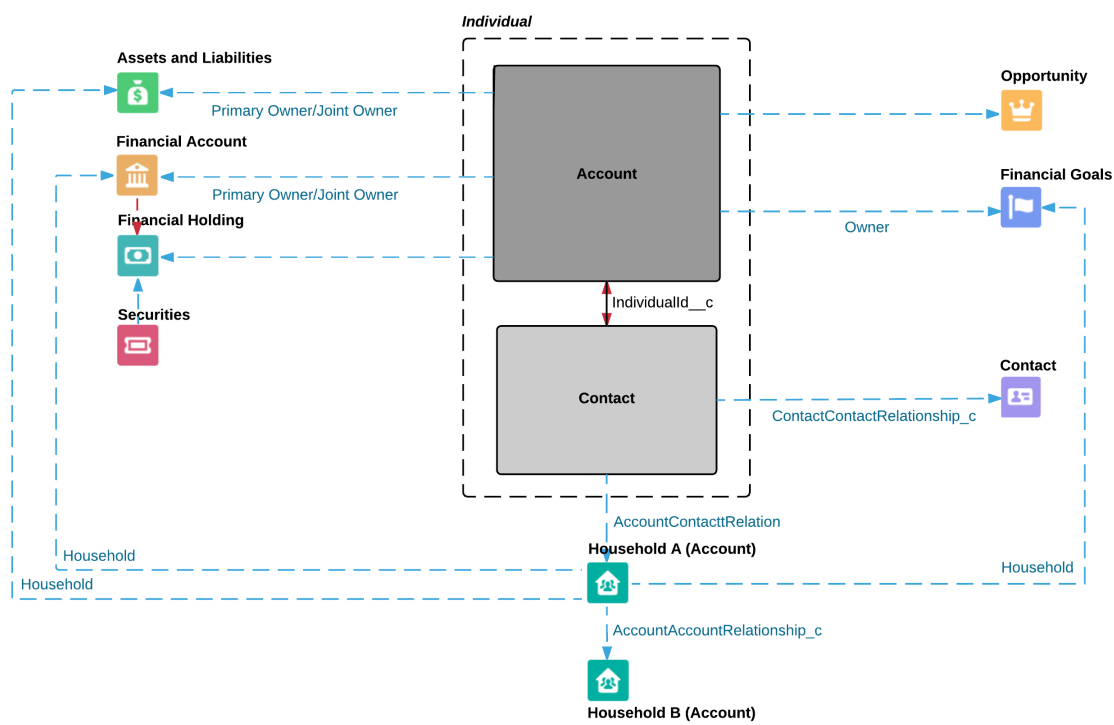
Available in Lightning Experience for an extra cost in: **Professional**, **Enterprise**, and **Unlimited** Editions

## Data Model Overview

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

### EDITIONS

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



# 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.

## EDITIONS

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

# 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.

## EDITIONS

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

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

Object	Standard or Custom	Purpose	Record Types
		review frequency or service tier. <ul style="list-style-type: none"> <li>Is related to opportunities, cases, and other Salesforce transactions.</li> </ul>	
Contact	Standard	<ul style="list-style-type: none"> <li>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.</li> <li>Is related to events, tasks, calls, and other Salesforce communications.</li> </ul>	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"> <li>Bank Account</li> <li>General Account</li> <li>Investment Account</li> <li>Insurance Policy</li> </ul>
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"> <li>Account Role</li> <li>Contact Role</li> </ul>

### EDITIONS

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

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"> <li>• Asset</li> <li>• Liability</li> </ul>
Financial Goals	Custom	A client's financial goal, such as retirement or home purchase.	

### EDITIONS

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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.

### EDITIONS

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

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	The relationship between the contact part of an individual and the household that the individual belongs to.	
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.

### EDITIONS

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

# SECURING YOUR DATA WITH SALESFORCE SHIELD

Salesforce Shield—a set of security tools that helps you protect data at rest, monitor usage, and prevent malicious activity—is fully supported. If you implement Shield, keep in mind these considerations when securing your confidential client data using Platform Encryption, event monitoring, and Field Audit Trail.

We strongly recommend that you first review the Salesforce online help to understand how the Salesforce Shield security tools work. Use that information along with these important considerations when implementing security for Financial Services Cloud.

## EDITIONS

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

### Considerations for Platform Encryption

Platform Encryption gives your data a whole new layer of security while preserving critical platform functionality. The data you select is encrypted at rest, to help your firm confidently comply with privacy policies, regulatory requirements, and contractual obligations for handling private data. Consider these important pre-installation and post-installation requirements.

### Considerations for Monitoring User Activity with Event Log Files


Event log files contain the granular details of user activity. Information about these user activities, known as *events*, let you swiftly identify abnormal behavior and safeguard data. Refer to these considerations when retrieving event log files that are stored in the EventLogFile API object.

## Considerations for Platform Encryption

Platform Encryption gives your data a whole new layer of security while preserving critical platform functionality. The data you select is encrypted at rest, to help your firm confidently comply with privacy policies, regulatory requirements, and contractual obligations for handling private data. Consider these important pre-installation and post-installation requirements.

Before you install Financial Services Cloud, ensure that these fields are not encrypted and have never been encrypted previously.

- Account object: Name field
- Contact object: Name field
- Contact object: Mailing Address field

 **Important:** If any of these fields are—or have ever been—encrypted, you can't install the managed package. To proceed, contact your Salesforce account representative to request a new org.

Even after successful installation, these fields can't be encrypted.

## EDITIONS

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

## Considerations for Monitoring User Activity with Event Log Files

Event log files contain the granular details of user activity. Information about these user activities, known as *events*, let you swiftly identify abnormal behavior and safeguard data. Refer to these considerations when retrieving event log files that are stored in the EventLogFile API object.

These custom event types are packaged and accessible in event log files.

- LoadClientList
- LoadHouseholdList
- CreateClient
- ViewClient
- EditClient
- ViewHousehold
- EditHouseholdMembership
- ViewClientDetailsTab
- ViewClientFinancialsTab
- ViewClientRelationshipsTab
- ViewClientFinancialGoalsTab
- ViewClientRelatedListTab
- ViewHHRelatedListTab
- ViewHouseholdFinancialGoalsTab
- ViewHouseholdRelationshipsTab
- ViewHouseholdFinancialsTab
- ViewHouseholdDetailsTab

A single instance of these activities results in multiple event types.

### EDITIONS

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

Event Type	View Client	Create Client	Edit Client	Create Household
ViewClient (sObject type Account)	✓	✓	✓	
ViewClient (sObject type Contact)	✓	✓	✓	
ViewClientDetailsTab (sObject type Account)	✓	✓	✓	
CreateClient (sObject type Account)		✓		
CreateClient (sObject type Contact)		✓		
EditClient (sObject type Account)			✓	
EditClient (sObject type Contact)			✓	
ViewHousehold (sObject type Account)				✓
ViewHouseholdDetailsTab (sObject type Account)				✓

Some activities are tracked as standard event types, not as Financial Services Cloud custom event types.

- Creating a household creates a standard account record.
- Creating a client from an account or contact list view creates a standard account or contact record, respectively. The corresponding account or contact part of the client that is typically created automatically is not tracked as a separate event.



# PRE-INSTALLATION TASKS

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

## EDITIONS

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

## Verify That Contacts to Multiple Accounts Is Enabled

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

1. From Setup, enter *Account Settings* in the *Quick Find* box, then select **Account Settings**.
2. Ensure that *Allow users to relate a contact to multiple accounts* is selected.

## EDITIONS

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

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

## EDITIONS

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

## Register a Custom Domain Name

Register a custom domain name and deploy it. 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`

## EDITIONS

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

- 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 the 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**, and then confirm that you want to make the permanent change of deploying the custom domain to users.

## Enable Chatter Feed

Verify that Chatter is enabled before you install Financial Services Cloud packages. You can then disable Chatter after finishing all required implementation tasks.

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

### EDITIONS

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

## 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.

### EDITIONS

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

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:

[Set Up Notes](#)

[Configure Page Layouts for Notes](#)

[Enable Lightning Experience](#)

## Enable Lightning Experience

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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: **Professional**, **Enterprise**, and **Unlimited** Editions

# 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

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

## 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.

### EDITIONS

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

## 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...**

### EDITIONS

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

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.

## EDITIONS

Available in Lightning Experience for an extra cost in: **Professional**, **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.

We recommend items in this order:

- Home
- Clients
- Households
- Feed
- Tasks
- Notes
- Calendar
- Dashboards
- Opportunities
- Leads
- Accounts
- Contacts
- Reports
- Files
- People
- Groups
- Financial Accounts
- Assets and Liabilities

## EDITIONS

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

- 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.

## Configure the Home Page

Configure the Home page to include the appropriate Lightning Experience components.

Let's configure the Home page so you can make the most of Lightning Experience components.

1. Navigate to the standard Home page ().
2. From the Setup menu () , click **Edit Page**.  
The Home page opens Lightning App Builder.
3. Remove these components:
  - Recent Records
  - Top Deals
  - Today's Tasks
4. Optionally, from the right pane, click **Page** to enter a new page label and description.
5. Drag one or more of these Financial Services Cloud specific components to the Home page.
  - Finserv:birthdayCard
  - FinServ:taskCard
  - FinServ:leadCard
  - FinServ:opportunityCard
6. Save your changes.
7. From the Page Saved dialog, click **Activate**.
8. If you chose to assign the page to specific profiles, select one or more profiles and then click **Next**.
9. After you finish activation, click **Back** to exit the App Builder and then refresh your browser.  
Congratulations! You've configured your Home page!

### EDITIONS

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

## 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.

### EDITIONS

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

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.

### EDITIONS

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

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 Related Lists to Account and Contact Page Layouts

Add related lists to account and contact detail pages so that advisors can see all the clients and households that an entity has relationships with. The related lists complement the relationship information that's shown on client and household profiles, helping advisors more easily cultivate new business through centers of influence.


### EDITIONS

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

1. Add the Related Contacts related list to the Contact Layout.
  - a. From the management settings for Contacts, go to **Page Layouts**.
  - b. Select **Edit** next to Contact Layout.
  - c. Select the **Related Lists** category in the palette, and then drag **Related Contacts** to the Related Lists section.
  - d. Double-click the tabbed portion of the newly added related list, and then verify the Selected Fields. We recommend these selections, in this order.
    - Contact
    - Related Role
    - End Date
    - Active
  - e. Save your changes.

The Related Contacts related list is added to the contact detail page.

2. Add the Related Accounts related list to the Account Layout.
  - a. From the management settings for Accounts, go to **Page Layouts**.
  - b. Select **Edit** next to Account (Business) Layout.
  - c. Select the **Related Lists** category in the palette, and then drag **Account Account Relations (Account)** to the Related Lists section.



**Tip:** Confirm that you're choosing the correct item by first hovering over it in the palette. Don't choose the similarly labeled **Account Account Relations (Related Account)** option.

The Related Accounts related list is added to the account detail page for business accounts.

## Add Global Actions to Publisher Layouts

Enable global actions so that advisors can easily record details about client tasks, events, and calls, by simply launching an action from the Salesforce header.

1. Replace the default actions available to advisors in Salesforce1 and Lightning Experience Actions.
  - a. From Setup, enter *Global Actions* in the **Quick Find** box, then select **Publisher Layouts**.
  - b. Select **New**.
  - c. Give the publisher layout a name, such as *Advisor Publisher Layout*.
  - d. Save your changes.
  - e. Select the override option in the Salesforce1 and Lightning Experience Actions section.
  - f. Remove these actions: **New Event**, **New Task**, and **Log a Call**.
  - g. Select the **Salesforce1 Actions** category in the palette, and then drag these actions to the Salesforce1 and Lightning Experience Actions section.
    - **NewEventAdvisor**
    - **NewTaskAdvisor**
    - **LogACallAdvisor**
  - h. Save your changes.
2. Assign the Advisor Publisher Layout to the Advisor profile.
  - a. From the list of Global Publisher Layouts, select **Publisher Layout Assignment**.
  - b. Select **Edit Assignment**.
  - c. In the table, select the cell for the Advisor profile.  
If other profiles need this layout assigned as well, select them now.
  - d. Choose *Advisor Publisher Layout* from the drop-down list.
  - e. Save your changes.

### EDITIONS

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

## 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**

### EDITIONS

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


- **Delete**
- **Edit**

4. Save your changes.
5. Repeat these steps for each custom object's page layout, as needed.


## 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. Make sure to assign both the profile and the permission set to your advisors.

 **Tip:** To access permission sets, from Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**. Later, when you're ready to assign the permission set to your advisors, select **Manage Assignments**.

You can edit the Advisor profile because you created it and mapped it to the packaged Advisor profile that we provide. You can't edit the Advisor Access permission set. If you want to add permissions, leave the Advisor Access permission set as is, and create another permission set for the extra permissions. Keeping them separate helps ensure that future upgrades to the Advisor Access permission set don't affect your additions.

 **Note:** Be sure to make your edits to—or clone from—the Advisor profile (not the Standard User profile). The Standard User profile doesn't have access to packaged features.

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
  - 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 enable read access on the *Type* field.
5. For both the Advisor and System Administrator profiles, verify the record type settings for these objects.

### EDITIONS

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

- Events default to *Advisor Event*
- Leads default to *Retirement Planning*
- Opportunities default to *Opportunity (Wallet Share)*
- Tasks default to *Advisor Task*

## Create a User with the Advisor Profile and Permission Set

Create a user and assign it the Advisor profile and Advisor Access permission set. Then 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. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
5. Select the permission set that you cloned from the Advisor Access permission set, and then select **Manage Assignments**.
6. Select **Add Assignments**.
7. Select the checkbox next to the user's name, and then select **Assign**.
8. Dismiss the confirmation message.
9. 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: **Professional**, **Enterprise**, and **Unlimited** Editions

## 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

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

## 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!* to view the default, packaged reciprocal roles.

Role	Inverse
Accountant	Client
Lawyer	Client
Parent	Dependent
Dependent	Parent
Ex-Spouse	Ex-Spouse
Grandparent	Grandchild
Grandchild	Grandparent
Power of Attorney	Client
Extended Family	Extended Family
Business	Proprietor

3. Review and edit these reciprocal roles as needed. If you add a new reciprocal role record and leave **Create Inverse Role** selected, we automatically create a corresponding record that has the values for Role and Inverse swapped.



**Note:** The default reciprocal role values are available in English only; they are not translated. To make them available in another language, delete the packaged records and create your own records as needed.

### EDITIONS

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

## Configure B2C Lead Record Types

We've packaged the Retirement Planning lead record type to represent a commonly used B2C lead. Refer to this example as you create your own record types for managing your firm's B2C business.

1. From Setup, enter *Leads* in the **Quick Find** box, then select **Record Types**.
2. Review the properties of the Retirement Planning record type, then use it as a model for creating your own B2C lead record types.

### EDITIONS

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

## Map Lead Fields for Lead Conversion

Specify how to convert information from custom lead fields to custom contact fields when converting a lead to a contact.

1. From Setup, enter *Leads* in the *Quick Find* box, then select **Fields**.
2. In the custom fields section, click **Map Lead Fields**.
3. For Created from Lead, select the custom field, *Contact.Created from Lead*.
4. For Employer, select the custom field, *Contact.Current Employer*.
5. Save your changes.

### EDITIONS

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

## Create Lead Status Picklist Values

Add picklist values to the Lead Status field to allow advisors to track contacted leads.



**Note:** Make sure you're in Salesforce Classic.

1. From Setup, enter *Leads* in the *Quick Find* box, then select **Fields**.
2. Select **Lead Status**.
3. Create picklist values for *Working - Contacted* and then for *Nurturing - Contacted*.
  - a. Click **New**.
  - b. For **Lead Status**, enter *Working - Contacted*.
  - c. Save your changes.
  - d. Repeat these steps and enter *Nurturing - Contacted*.
4. Configure **Lead Status** picklist values from *Lead Process*.
  - a. From Setup, enter *Lead Process* in the *Quick Find* box, then select *Lead Process*.
  - b. Select *Lead Process*.
  - c. Add at least one (Converted) value from left to right.
  - d. Select the default value: *New*
  - e. Save your changes.

### EDITIONS

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

## Create Opportunity Stage Picklist Values

Add picklist values to the Stage field to allow advisors to track open client opportunities.

1. From Setup, enter *Opportunities* in the *Quick Find* box, then select **Fields**.
2. Select **Stage**.
3. Create picklist values for *Assessment Needed*, *Develop Proposal*, *Client Presentation*, and *Initiate Transfer*.
  - a. From Opportunity Stages Picklist Values, click **New**.

### EDITIONS

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

- b. Give the stage a name.
- c. Enter the probability that the stage represents.

We recommend these percentages:

- Assessment Needed—25
- Develop Proposal—50
- Client Presentation—75
- Initiate Transfer—90

- d. Select **Sales Processes**:

- Opportunity Process
- Wallet Share
- Other values (optional)

- e. Save your changes.

## Configure Dashboard Components

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

1. 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

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

## 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

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

## Configure Company Name Override for Leads (Optional)

Configure the company name override in Custom Settings as part of configuring the B2C lead conversion process. By default, the override is enabled for System Administrator and Advisor Profiles.

1. From Setup, enter *Custom Settings* in the Quick Find box, then select **Custom Settings**.
2. Select **B2C Lead Company Name Config**.
3. Click **Manage** and then edit **System Administrator** or **Advisor**.
4. To turn off the override, clear *Override Company Name*.
5. If you want to apply this custom setting to other profiles or users, add them and make sure that *Override Company Name* is selected for each one.

### EDITIONS

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

## Configure Chatter Feed Tracking (Optional)

If your firm has approved Chatter for use, configure feed tracking to allow advisors to use the Chatter feed on client and household profiles. The feed makes it easy for the advisory team to provide collaborative service and advice. Chatter isn't required for any packaged functionality except the Chatter feed on the Collaborate tab.

1. Verify that Chatter is enabled.
  - a. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
  - b. In the Chatter Settings section, verify that *Enable* is selected.
2. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.
3. To enable the Chatter feed on the client profile, configure feed tracking for the Contact object. To enable the Chatter feed on the household profile, configure feed tracking for the Account object.
  - a. Select the object.
  - b. Select *Enable Feed Tracking*.
  - c. Save your changes.

### EDITIONS

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

## 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

### EDITIONS

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




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

3. Save your changes.

## Review Profile Assignments (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.

 **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.

### EDITIONS

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

## 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.

### EDITIONS

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

# 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](#)

[Reports and Dashboards: What's Not in Lightning Experience](#)

### EDITIONS

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

## 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 My Clients list view.
- Upcoming Birthdays (Next 7 Days) is the underlying report for the default Upcoming Birthdays 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 My 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

### EDITIONS

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

 **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 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

### EDITIONS

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

### EDITIONS

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

Object	Address Fields	Used As
Contact	Shipping	Seasonal

## 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

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

## 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

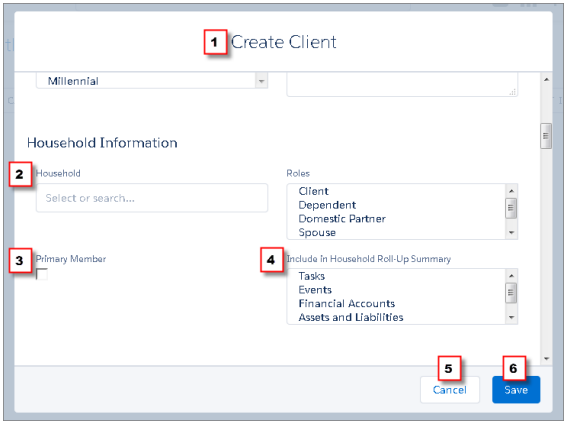
Available in Lightning Experience for an extra cost in: **Professional, Enterprise, and Unlimited** Editions

## 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.

### EDITIONS

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



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 or if you operate in a language other than English, 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.

#### EDITIONS

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

## 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.

#### EDITIONS

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

The screenshot shows the 'Create Client' dialog box. At the top, there's a dropdown menu set to 'Millennial'. Below it, the 'Household Information' section contains a 'Household' field with a search prompt 'Select or search...'. To the right, the 'Roles' dropdown is open, showing 'Client', 'Dependent', 'Domestic Partner', and 'Spouse'. Below the roles, the 'Include in Household Roll-Up Summary' field is highlighted with a red circle, showing a list of options: 'Tasks', 'Events', 'Financial Accounts', and 'Assets and Liabilities'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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

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

# 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 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

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

## 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

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

## 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

### EDITIONS

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

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

#### [Upload Client Data Using Data Loader](#)

Start the process of uploading data using Data Loader by uploading data about clients. First upload Account data, then Contact data.

#### [Upload Household Data Using Data Loader](#)

Continue uploading data about households using Data Loader.

#### [Relate Clients to Households Using Data Loader](#)

Relate clients to households from your previous uploads of Account and Contact data, using Data Loader.

#### [Upload Financial Account Data Using Data Loader](#)

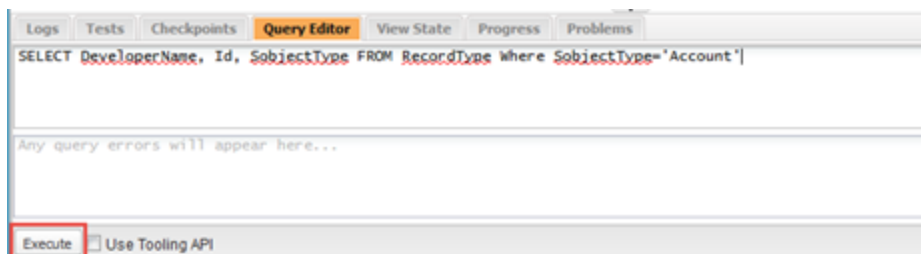
Continue uploading data about financial accounts using Data Loader.

## Upload Client Data Using Data Loader

Start the process of uploading data using Data Loader by uploading data about clients. First upload Account data, then Contact data.

Before you start, we recommend that you:

- Ensure that you've identified all the picklist values in use for each object so that you load only valid values for picklist or multi-select picklist fields.
  - Run the latest version of Data Loader, which is always available in Salesforce.
1. In the Developer Console, look up the Id for the `IndustriesIndividual` record type for the Account object.
    - a. From the Salesforce header, open the Developer Console.
    - b. Select the Query Editor tab.
    - c. Enter this SOQL query: `SELECT DeveloperName, Id, SubjectType FROM RecordType Where SubjectType='Account'`.



- d. **Execute** the query.
- e. From the query results, copy the Id for the record that shows `IndustriesIndividual` in the `DeveloperName` field.

### EDITIONS

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




Query Results - Total Rows: 3		
DeveloperName	Id	SubjectType
IndustriesBusiness	012B000000019PMIA0	Account
IndustriesHousehold	012B000000019PHIA0	Account
IndustriesIndividual	012B000000019P0IA0	Account

- In the Data Loader, after you've logged in, export the Account object to a CSV file.

We recommend that you:

- Choose to export the data to a new CSV file. Let's say that you choose the file name `account.csv`.
- Choose **Select all fields** when creating your SOQL query.

- In the resulting `account.csv` file, paste the `Id` value that you copied from your earlier query into the `RecordTypeId` field for every client record that you upload.


 **Important:** Every client record must have this same `RecordTypeId` value. The `FinServIndividualType__c` field also shows the value, `Individual`, which confirms that the record type corresponds to an individual.

- In the `account.csv` file, enter the rest of your client data to upload data for the account part of each client.

Keep in mind these guidelines.

- For newly created records, the value of `OwnerId` defaults to your user ID. If you want to change `OwnerId` values so that various advisory team members are assigned ownership of client records, do so now.
- Ensure that dates are formatted to match the date format specified for your org.

- In the Data Loader, insert the data from your updated `account.csv` file. **Create or Edit a Map** and choose the option to **Auto-Match Fields to Columns**.

 **Tip:** For every account record that has the `Individual` `RecordTypeId`, Salesforce automatically creates a primary contact record for each account record. In a later step, you perform another data upload to update these contact records.


- In your org, check for the newly created client records to verify your upload of Account data.

- In the Data Loader, export the Contact object to a CSV file.

We recommend that you:

- Choose to export the data to a new CSV file. Let's say that you choose the file name `client_contact.csv`.
- Choose **Select all fields** when creating your SOQL query. Specify the condition that the `FinServIndividualType__c` field = `Individual`.

- In the `client_contact.csv` file, enter your client data to update data for the contact part of each client, such as mailing address and email.

 **Important:** Do not edit these fields that uniquely identify each contact record and its relationship with the account part of the client.

- `RecordTypeId`
- `Id`
- `FinServIndividualId__c`
- `FinServIndividualType__c`
- `AccountId`

- In the Data Loader, update the data from your updated `client_contact.csv` file. **Create or Edit a Map** and choose the option to **Auto-Match Fields to Columns**.

10. In your org, check for the updated client records to verify your upload of Contact data.

## Upload Household Data Using Data Loader

Continue uploading data about households using Data Loader.

1. In the Developer Console, look up the `Id` for the `IndustriesHousehold` record type for the Account object.
  - a. From the Salesforce header, open the Developer Console.
  - b. Select the Query Editor tab.
  - c. Enter this SOQL query: `SELECT DeveloperName, Id, SubjectType FROM RecordType Where SubjectType='Account'`.



**Tip:** Since you already queried for the `Id` in an earlier step when you uploaded client data, check the History pane. If your previous query is listed, select it for quick reuse.

- d. **Execute** the query.
  - e. From the query results, copy the `Id` for the record that shows `IndustriesHousehold` in the `DeveloperName` field.
2. In the Data Loader, export the Account object to a CSV file.  
We recommend that you:
  - Choose to export the data to a new CSV file. Let's say that you choose the file name `household.csv`.
3. In the resulting `household.csv` file, delete all columns except for these columns.
  - `FinServNotes__c`
  - `Name`
  - `RecordTypeId`
  - `OwnerId` (Required only if you want to change `OwnerId` values so that various advisory team members are assigned ownership of household records.)
  - Any custom fields that you've added.
4. In the `household.csv` file, paste the `Id` value that you copied from your earlier query into the `RecordTypeId` field for every household record that you upload.
5. In the `household.csv` file, enter the rest of your household data.
6. In the Data Loader, insert the data from your updated `household.csv` file. **Create or Edit a Map** and choose the option to **Auto-Match Fields to Columns**.
7. In your org, check for the newly created household records to verify your upload of Account data.

### EDITIONS

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

## Relate Clients to Households Using Data Loader

Relate clients to households from your previous uploads of Account and Contact data, using Data Loader.

1. In the Data Loader, export the Account object to a CSV file.  
We recommend that you:
  - Choose to export the data to a new CSV file. Let's say that you choose the file name `households.csv`.

### EDITIONS

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

- Choose **Select all fields** when creating your SOQL query. Specify the condition that the value of `RecordTypeId__c = Record Type ID`, where *Record Type ID* corresponds to the value for `IndustriesHousehold`.
2. In your org, add a member to any household. Make sure to select all values in the `Include in Household Roll-Up Summary` field so that you load only valid values for this picklist field.
  3. In the Data Loader, export the `AccountContactRelation` object to a CSV file.  
We recommend that you:
    - Select `Show all Salesforce objects`, and then select `Account Contact Relationship (AccountContactRelation)`.
    - Choose to export the data to a new CSV file. Let's say that you choose the file name `acr.csv`.
    - Choose **Select all fields** when creating your SOQL query. Specify the condition that `IsDirect = false AND FinServRollups__c includes ('Tasks')`.
  4. In the resulting `acr.csv` file, delete all columns except for these columns.
    - `CreatedDate`
    - `CreatedById`
    - `LastModifiedDate`
    - `LastModifiedById`
    - `SystemModStamp`
  5. In the `client_contact.csv` file that you exported during client data upload, copy all the values from the `Id` column and paste them into the `ContactId` column of the `acr.csv` file.
  6. For each unique contact ID in the `client_contact.csv` file, determine which household the contact belongs to. Map the corresponding household ID to that contact in the `acr.csv` file. Based on this mapping, copy the values from the `Id` field in the `households.csv` file and paste them into the `ContactId` column of the `acr.csv` file.
  7. In the `acr.csv` file, enter the rest of your data to relate clients to households.  
Keep in mind these guidelines.
    - `Roles` define an individual's role within the household, such as client, spouse, or dependent.
    - The value of `IsDirect` must be `false` for all records.
    - If the individual is the primary household member, set `FinServPrimary__c` to `true`.
    - In `FinServPrimary__c`, include the items that you want to be summarized at the household level.
  8. In the Data Loader, insert the data from your updated `acr.csv` file.
    - a. Select `Show all Salesforce objects`, and then select `Account Contact Relationship (AccountContactRelation)`.
    - b. **Create or Edit a Map** and choose the option to **Auto-Match Fields to Columns**.
  9. In your org, check the membership information in some household profiles to verify your upload of `AccountContactRelation` data.

## Upload Financial Account Data Using Data Loader

Continue uploading data about financial accounts using Data Loader.

1. In your org, create an initial financial account record for each type of financial account, associated with any client: investment account, bank account, and insurance policy. On one of the financial accounts, designate the client as a joint owner.

2. In the Data Loader, export the FinancialAccount object to a CSV file.

We recommend that you:

- Choose to export the data to a new CSV file. Let's say that you choose the file name `financialaccount.csv`.
- Choose **Select all fields** when creating your SOQL query.

3. In the resulting `financialaccount.csv` file, delete these columns.

- `CreatedDate`
- `CreatedById`
- `LastModifiedDate`
- `LastModifiedById`
- `SystemModStamp`
- `LastActivityDate`
- `LastViewedDate`
- `LastReferencedDate`
- `Id`
- `FinServHousehold__c`

4. In the `financialaccount.csv` file, enter the rest of your financial account data.

We recommend that you:

- In the `client_contact.csv` file that you exported during client data upload, copy the values from the `AccountId` column and paste them into the `FinServPrimaryOwner__c` column of the `financialaccount.csv` file.
- For any jointly owned financial account, make sure that you enter the correct `FinServJointOwner__c` value from the `AccountId` column in the `client_contact.csv` file.
- Ensure that you enter the correct value for `FinServOwnership__c`, using the valid ownership values retrieved in your initial export of financial account data.

5. In the Data Loader, insert the data from your updated `financialaccount.csv` file. **Create or Edit a Map** and choose the option to **Auto-Match Fields to Columns**.

6. In your org, check for the newly created financial account records to verify your upload of FinancialAccount data.

7. In the Data Loader, export the FinancialAccount object to a CSV file. Let's say that you choose the file name `financial_accounts_export.csv`.

This export file is used later to relate financial holdings to financial accounts.

### EDITIONS

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

# 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.

## EDITIONS

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

## Supported Browsers

Financial Services Cloud is supported with Apple® Safari® version 8.x and 9.x on Mac OS X and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. Support for Microsoft® Internet Explorer® version 11 to access Lightning Experience is retiring beginning in Summer '16. There are some limitations.

- Microsoft Edge isn't supported for the Developer Console.

## Features Not Supported with Financial Services Cloud

- These features are not supported. We don't recommend enabling them.
  - Duplicate Management
- 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, valid values are a Business account or an Individual account. Lead conversion is not supported for the Household account record type.
- Access to client and household profiles on the Salesforce1 mobile app is not fully supported.
- If multi-currency is enabled, there are some limitations.
  - Advanced currency management is not available.
  - Ensure that the `Currency Iso Code` field is included on any page layout that includes a currency field.
  - For each user, ensure that their user currency corresponds to the default currency for the user's locale.
  - When filtering by currency values in reports or list views, users must specify a currency ISO code—such as USD or GBP—before the value. For example, `GBP100000`. The ISO code must be one of your firm's active currencies.
- Localization in French, German, Japanese, Spanish, and Portuguese (Brazil) is supported. There are some exceptions.

## Feature Availability and Limitations

- The names of the packaged Advisor and Client Associate profiles are English only.
- For Opportunities, the names of the General record type and Opportunity Process are English only.
- For Leads, the names of the General record type and Lead Process are English only.
- All record type descriptions are English only.
- If Person Accounts is enabled, client-related features require extra configuration.

# UPGRADES

## Post-Upgrade Tasks

If you have previously installed Financial Services Cloud before the Summer '16 upgrade, perform these required tasks after upgrade. If version 2.0 is your first installation, you automatically have the latest and greatest, and these tasks don't apply.

### [Manage the Navigation Menu for Users](#)

Replace the custom Home tab with the standard Home tab.

### [Configure the Home Page](#)

Part of the upgrade process is making sure to configure the Home page.

### [Update Advisor Profile Permissions](#)

Update the Advisor profile's required permissions and field level security settings that aren't automatically updated in an upgraded package.

### [Configure B2C Leads and Map Leads to Contacts](#)

Configure B2C leads and map leads to contacts.

### [Create Picklist Values for Lead Status and Opportunities](#)

Create picklist values to track leads and opportunities.

### [Configure Opportunity Actions for Financial Accounts](#)

Enable actions on financial account page layouts so that advisors can create wallet share opportunities from financial accounts.

### [Add Fields to Page Layouts](#)

Add the fields to page layouts that aren't automatically updated in an upgraded package.

### [Add Related Lists and Global Actions to Layouts](#)

Add related lists to account and contact detail pages. Enable global actions from the Salesforce header.



#### EDITIONS

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

## Manage the Navigation Menu for Users

Replace the custom Home tab with the standard Home tab.

You must replace the existing custom Home tab with the standard Home tab in the Navigation menu.

1. In Lightning Setup, search for *Navigation* in the **Quick Find** box.
2. Click **Navigation Menus**.
3. From the list of actions for the custom Navigation menu, select **Edit**.
4. Click **Next**.
5. Remove the existing Home menu item ()
6. Add the standard Home menu item () and move it to the top of the list.
7. Click **Next** and then assign profiles to the navigation menu.

#### EDITIONS

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

8. Save your changes.

## Configure the Home Page

Part of the upgrade process is making sure to configure the Home page.

[Configure the Home Page](#) provides you with the steps to continue upgrading Financial Services Cloud.

### EDITIONS

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

## Update Advisor Profile Permissions

Update the Advisor profile's required permissions and field level security settings that aren't automatically updated in an upgraded package.

1. From Setup, enter *Profiles* in the *Quick Find* box, then select **Profiles**.
2. Select the Advisor profile.
3. Edit the Page Layout Assignments for Account and Opportunity.
  - a. For Account, select **View Assignment**.
  - b. Select **Edit Assignment**.
  - c. In the table, select the cell for the Advisor profile and Business record type.
  - d. Choose *Account (Business) Layout* from the drop-down list.
  - e. Save your changes.
  - f. For Opportunity, select **View Assignment**.
  - g. Select **Edit Assignment**.
  - h. In the table, select the cell for the Advisor profile and Opportunity (Wallet Share) record type.
  - i. Choose *Opportunity (Wallet Share) Layout* from the drop-down list.
  - j. Save your changes.
4. Set field permissions for the *Financial Account* field in the Opportunity 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 *Opportunities* and select **Opportunities** from the list. Edit the opportunity and enable Read and Edit for the *Financial Account* field.
  - Original profile user interface—In the Field-Level Security section, select **View** next to Opportunity. Edit the opportunity and enable Read Access and Edit Access on the *Financial Account* field.
5. Edit the Record Type Settings for Leads and Opportunities.
  - a. Select **Edit** next to Leads.
  - b. Add General and Retirement Planning to Selected Record Types.
  - c. Set the default record type to *Retirement Planning*.
  - d. Save your changes.
  - e. Select **Edit** next to Opportunities.

### EDITIONS

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



- f. Add General, Opportunity (Wallet Share), and Retirement Planning to Selected Record Types.
  - g. Set the default record type to *Opportunity (Wallet Share)*.
  - h. Save your changes.
6. Edit these Custom Object Permissions.
- **Account Account Relations**—Remove Delete access
  - **Contact Contact Relations**—Remove Delete access
  - **Reciprocal Roles**—Remove Create, Edit, and Delete access

## Configure B2C Leads and Map Leads to Contacts

Configure B2C leads and map leads to contacts.

To configure and map leads:

- [Configure B2C Lead Record Types](#)
- [Map Lead Fields for Lead Conversion](#)

### EDITIONS

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

## Create Picklist Values for Lead Status and Opportunities

Create picklist values to track leads and opportunities.

To add picklist values:

- [Create Lead Status Picklist Values](#)
- [Create Opportunity Stage Picklist Values](#)

### EDITIONS

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

## Configure Opportunity Actions for Financial Accounts

Enable actions on financial account page layouts so that advisors can create wallet share opportunities from financial accounts.

1. From the management settings for the Financial Account custom object, go to **Page Layouts**.
2. Select **Edit** next to the first packaged page layout: Financial Account (Banking) Layout.
3. Replace the actions in the Quick Actions in the Salesforce Classic Publisher section.
  - a. Remove all existing actions.
  - b. Select the **Quick Actions** category in the palette, and then drag these actions to the section.
    - **New Opportunity**
    - **New Opportunity (Wallet Share)**
4. Select the **Salesforce1 Actions** category in the palette, and then drag these actions to the Salesforce1 and Lightning Experience Actions section.
  - **Clone**
  - **Delete**

### EDITIONS

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

- **Edit**
- **New Event**
- **New Task**
- **Log a Call**
- **New Opportunity**
- **New Opportunity (Wallet Share)**

5. Save your changes.
6. Repeat these steps for the other Financial Account page layouts: Financial Account (Insurance) Layout and Financial Account (Investment) Layout.
7. Verify that advisors are able to create wallet share opportunities from financial accounts.
  - a. Go to the Financials tab on a client or household profile.
  - b. Select the arrow icon next to the name of any bank account, insurance policy, or investment account.
  - c. Look for the New Opportunity (Wallet Share) option.

## Add Fields to Page Layouts

Add the fields to page layouts that aren't automatically updated in an upgraded package.

1. Add the `Create Inverse Role` field to the Reciprocal Role Layout.
  - a. From the management settings for Reciprocal Role, go to **Page Layouts**.
  - b. Select **Edit** next to Reciprocal Role Layout.
  - c. Select the **Fields** category in the palette, and then drag **Create Inverse Role** to the Information section.
  - d. Save your changes.

The `Create Inverse Role` field is added to the dialog box used for creating or editing a reciprocal role record.

2. Add the `Price` field to the Financial Holding Layout.
  - a. From the management settings for Financial Holding, go to **Page Layouts**.
  - b. Select **Edit** next to Financial Holding Layout.
  - c. Select the **Fields** category in the palette, and then drag **Price** to the Financials section.
  - d. Save your changes.

The `Price` field is added to the financial holdings section for investment accounts shown on the Financials tab.

### EDITIONS

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

## Add Related Lists and Global Actions to Layouts

Add related lists to account and contact detail pages. Enable global actions from the Salesforce header.

To add related lists and global actions:

- [Add Related Lists to Account and Contact Page Layouts](#)
- [Add Global Actions to Publisher Layouts](#)

### EDITIONS

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

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