



Financial Services Cloud Administrator Guide

Salesforce, Spring '17



CONTENTS

FINANCIAL SERVICES CLOUD	1
THE SALESFORCE DATA MODEL FOR FINANCIAL SERVICES CLOUD	2
Data Model Overview	2
Tools for Getting Oriented to the Data Model	3
How Is an Individual Client Modeled?	3
How Are an Individual's Financial Accounts Modeled?	4
How Are an Individual's Other Assets, Liabilities, Goals, and Revenue Modeled?	5
How Is a Household Modeled?	6
Does the Data Model Implement a Party Model?	7
SECURING YOUR DATA WITH SALESFORCE SHIELD	8
Considerations for Platform Encryption	8
Considerations for Monitoring User Activity with Event Log Files	9
PLANNING CONSIDERATIONS FOR FINANCIAL SERVICES CLOUD	10
Considerations for Designing Your Implementation	10
A New Way of Working in Lightning Experience	10
LOAD DATA	12
Upload Data for Individuals Using Data Loader	12
Upload Household Data Using Data Loader	14
Relate Individuals to Groups Using Data Loader	15
Upload Financial Account Data Using Data Loader	16
CUSTOMIZE YOUR IMPLEMENTATION	18
Modify the Salesforce1 Navigation Menu	18
Add Actions to Custom Object Page Layouts	19
Customize Roles for Individuals	20
Configure Reciprocal Roles	20
Configure Company Name Override for Leads	21
Create an Admin User	21
Configure Custom Record Types for Individuals and Groups	22
Set Up a New Lightning Page for Contact Records	22
Financial Services Cloud Alerts	23
YOUR FINANCIAL SERVICES CLOUD ORG	24
Your Org's Changes	24
Your Org's Changes for Wave	30

Contents

SYSTEMS INTEGRATION 35
Guidelines for Salesforce for Outlook 35

FINANCIAL SERVICES CLOUD AVAILABILITY AND LIMITATIONS 36

INDEX 39

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

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, relationship groups, 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?](#)

Financial Services Cloud represents an individual client using a combination of the standard Account and Contact objects, coupled in what is called a *unified object view* of an individual person. These objects have been extended with custom fields, record types, and more.

[How Are an Individual'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 an Individual's Other Assets, Liabilities, Goals, and Revenue 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 is a relationship group that 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 an individual client (account and contact coupled), the contact and the individual 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

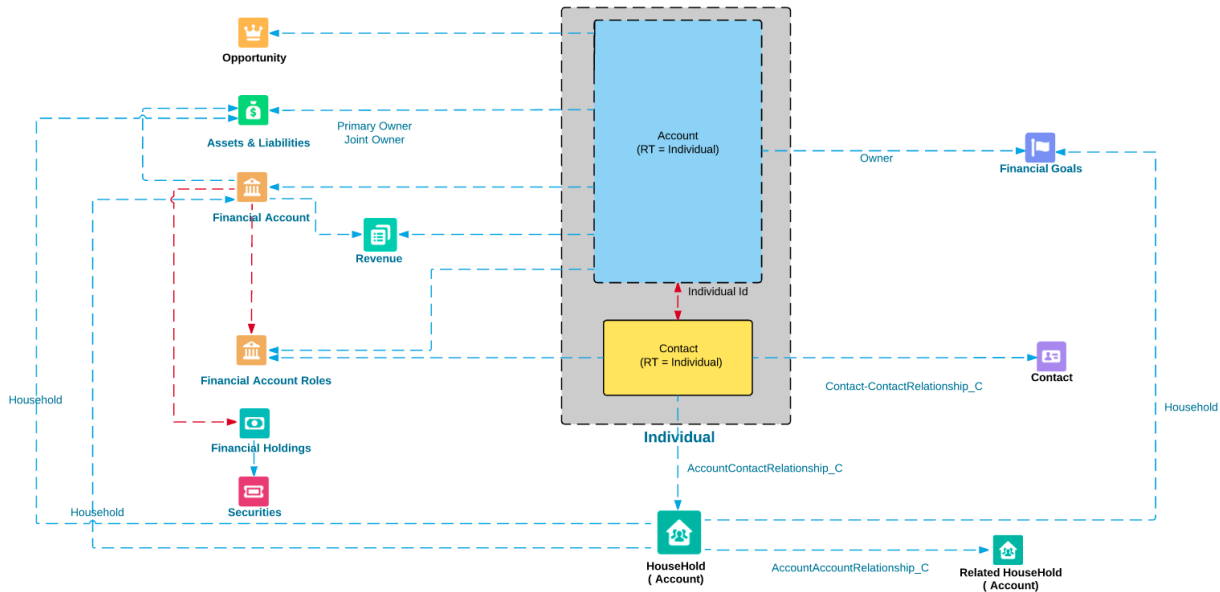
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Data Model Overview

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

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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?


Financial Services Cloud represents an individual client using a combination of the standard Account and Contact objects, coupled in what is called a *unified object view* of an individual person. These objects have been extended with custom fields, record 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 individual that pertain to dealings with your firm, such as review frequency or service tier Related to opportunities, 	Individual

Object	Standard or Custom	Purpose	Record Types
Contact	Standard	<p>cases, and other Salesforce transactions</p> <ul style="list-style-type: none"> Represents aspects of the individual that pertain to personhood regardless of the individual's relationship with your firm, such as birth date or tax ID number Related to events, tasks, calls, and other Salesforce communications 	Individual

 **Note:** Use the Individual record type when a client is an individual. Use the Institutional record type when a client is a business or an institution.

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 you reference the individual with a single ID.

Usually, with the unified object view, individuals 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.

 **Important:** Make sure that no required fields are on the Contact object. To add required fields for an individual client, create the fields on the Account object.

How Are an Individual'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 individual'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	<ul style="list-style-type: none"> Account Role Contact Role

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Object	Standard or Custom	Represents	Record Types
		financial account, such 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 individual's financial holding, such as a stock.	

How Are an Individual's Other Assets, Liabilities, Goals, and Revenue 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	An individual's assets, such as real estate or collectibles, and liabilities, such as a mortgage, that are not otherwise represented in the financial account.	<ul style="list-style-type: none"> • Asset • Liability
Financial Goals	Custom	An individual's financial goal, such as retirement or home purchase.	
Revenue	Custom	Revenue generated from an individual's financial account or advisory services.	

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How Is a Household Modeled?

A household is a relationship group that 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.

You can 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 households.

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Object	Standard or Custom	Represents	Record Types
Account	Standard	<ul style="list-style-type: none"> • Business • Individual • Institution • Group 	<ul style="list-style-type: none"> • Business • Individual • Institution • Household
Account-Account Relationship	Custom	The relationship between businesses, institutions, and groups.	
Account Contact Relationship	Standard	<p>The membership in a relationship group (for example, a household) and the relationship between an individual person and a business account.</p> <ul style="list-style-type: none"> • The membership in a relationship group lets you roll up a member's information to the group. • For a business account to be a member of a relationship group, the business must first be related to a person in the group. 	
Contact-Contact Relationship	Custom	The relationship between two contacts.	
Reciprocal Role	Custom	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 an individual client (account and contact coupled), the contact and the individual 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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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.

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[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 this field is not encrypted and has never been encrypted previously.

- Contact object: `Mailing Address` field

 **Important:** If this field is—or has 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, fields can't be encrypted.

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SEE ALSO:

[Protect Your Salesforce Data with Shield Platform Encryption](#)

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.

All Financial Services Cloud activities are tracked as standard event types.

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PLANNING CONSIDERATIONS FOR FINANCIAL SERVICES CLOUD

Before implementing Financial Services Cloud, it's important to determine the design. You also want to be familiar with working in Lightning Experience.

[Considerations for Designing Your 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.

[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 built exclusively for Lightning Experience.

Considerations for Designing Your 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.

- 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.

SEE ALSO:


[Financial Services Cloud Availability and Limitations](#)

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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 built exclusively for Lightning Experience.

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

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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 Experience, 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**.

SEE ALSO:

[Find Your Way Around Lightning Experience](#)

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

- 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.

We recommend this sequence for uploading individual, group, and financial account data.

1. Individuals
2. Relationship groups
3. Individuals' relationships to groups
4. Financial accounts
5. Securities
6. Financial Holdings

Continue with the remaining objects in any sequence.

[Upload Data for Individuals Using Data Loader](#)

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

[Upload Household Data Using Data Loader](#)

Continue uploading data about households using Data Loader.

[Relate Individuals to Groups Using Data Loader](#)

Relate individuals to groups 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 Data for Individuals Using Data Loader

Start the process of uploading data using Data Loader by uploading data about individuals. 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.

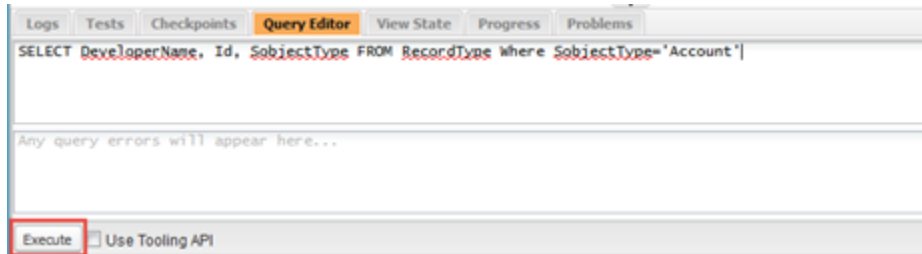
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- a. From the Salesforce header, open the Developer Console.
- b. Select the Query Editor tab.
- c. Enter this SOQL query: `SELECT DeveloperName, Id, SubjectType FROM RecordType Where SubjectType='Account'`.



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

Query Results - Total Rows: 3		
DeveloperName	Id	SubjectType
IndustriesBusiness	012B000000019PMIA0	Account
IndustriesHousehold	012B000000019PNEIA0	Account
IndustriesIndividual	012B000000019P0IA0	Account

2. 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.
3. In the resulting `account.csv` file, paste the `Id` value that you copied from your earlier query into the `RecordTypeId` field for every individual record that you upload.

Important: Every individual 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.


4. In the `account.csv` file, enter the rest of your individuals' data to upload data for the account part of each individual. 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 individual records, do so now.
 - Ensure that dates are formatted to match the date format specified for your org.
5. 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.

6. In your org, check for the newly created records for individuals to verify your upload of Account data.
7. 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`.
8. In the `client_contact.csv` file, enter your data for individuals to update data for the contact part of each individual, 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 individual.
 - `RecordTypeId`
 - `Id`
 - `FinServIndividualId__c`
 - `FinServIndividualType__c`
 - `AccountId`
 9. 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 individual 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 individual 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.

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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.

Relate Individuals to Groups Using Data Loader

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

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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`.
- 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 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 `AccountId` column of the `acr.csv` file.
7. In the `acr.csv` file, enter the rest of your data to relate individuals to groups.
Keep in mind these guidelines.

- Roles define an individual's role within the group, such as client, spouse, or dependent.
 - The value of `IsDirect` must be `false` for all records.
 - If the individual is the primary group member, set `FinServPrimary__c` to `true`.
 - In `FinServPrimary__c`, include the items that you want to be summarized at the group level.
 - If the group is the individual's primary group, set `FinServPrimaryGroup__c` to `true`.
 - If the individual is including a related business entity (for example, a business account) in the group, set `FinServIncludeInPrimaryGroup` to `true` for the business account.
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 group 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.

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- 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.

CUSTOMIZE YOUR IMPLEMENTATION

Are you ready for more? These tasks can take you far in Financial Services Cloud.

[Modify the Salesforce1 Navigation Menu](#)

Let advisors access Financial Services Cloud through the Salesforce1 mobile navigation menu.

[Add Actions to Custom Object Page Layouts](#)

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.

[Customize Roles for Individuals](#)

You can customize roles that represent the types of group members that your firm tracks.

[Configure Reciprocal Roles](#)

Within a relationship, a reciprocal role describes the role of one entity relative to another entity. For example, Client and Power of Attorney, or Proprietor and Business. We've provided a set of commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of attorneys, or various professional affiliations.

[Configure Company Name Override for Leads](#)

You can configure the company name override in Custom Settings as part of configuring the B2C lead conversion process.

[Create an Admin User](#)

To create an additional admin user for Financial Services Cloud, create a user and assign the required permissions.

[Configure Custom Record Types for Individuals and Groups](#)

Financial Services Cloud gives you the flexibility to configure custom individual and group record types. If your advisors have an individual or a relationship group that doesn't fit the default record type, you can configure a custom record type based on the default individual or group record type provided by Financial Services Cloud.

[Set Up a New Lightning Page for Contact Records](#)

When you create a Lightning record page for contacts, include the FinServ:clientRedirect component. This component ensures that a contact assigned to an Individual record type is redirected to the individual's page.

[Financial Services Cloud Alerts](#)

Financial Services Cloud (FSC) provides a framework for alerts so advisors can get timely alerts about clients and take necessary actions.

Modify the Salesforce1 Navigation Menu

Let advisors access Financial Services Cloud through the Salesforce1 mobile navigation menu.

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:
 - Accounts
 - Contacts

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- Financial Accounts
 - Financial Goals
 - Financial Holdings
 - Assets and Liabilities
 - Leads
 - Opportunities
 - Tasks
 - Notes
 - Events
 - Dashboards
 - Reports
 - Feed
 - People
 - Groups
 - Smart Search
3. Save your changes.



Note: Account pages display as Salesforce Classic account pages. The Home page doesn't work with Salesforce1 or mobile browsers.

SEE ALSO:

[What's Different or Not Available in the Salesforce1 Mobile App](#)

Add Actions to Custom Object Page Layouts

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 & Lightning 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 object's page layout, as needed.

EDITIONS

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

Customize Roles for Individuals

You can customize roles that represent the types of group members that your firm tracks.


1. From Setup (in Salesforce Classic only), enter *Contact Relationships* in the **Quick Find** box, then select **Fields** under Account Contact Relationships.
2. Select **Roles**.
3. Add or delete roles as needed.
4. Save your changes.

Configure Reciprocal Roles

Within a relationship, a reciprocal role describes the role of one entity relative to another entity. For example, Client and Power of Attorney, or Proprietor and Business. We've provided a set of commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of attorneys, or various professional affiliations.

EDITIONS

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

1. Switch to Salesforce Classic and go to the Reciprocal Roles tab.
 -  **Tip:** If the tab isn't 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, select **All**, and then select **Go** to view the 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
Sibling	Sibling
Spouse	Spouse

3. Edit these reciprocal roles as needed. If you add a reciprocal role record and select **Create Inverse Role**, Salesforce creates a corresponding record that has the values for Role and Inverse swapped.

 **Note:** The predefined reciprocal role are available only in English. To translate them into another language, delete the role records and create your own records.

Configure Company Name Override for Leads

You can 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 and replaces the company name with the lead's full name when saving a B2C lead.

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

Create an Admin User

To create an additional admin user for Financial Services Cloud, create a user and assign the required permissions.

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 *System Administrator* profile.
3. Save your changes.
4. Click **Permission Set Assignments** and then click **Edit Assignments**.
5. From Available Permission Sets, select **Advisor Access** and add it to Enabled Permission Sets.
6. Save your changes.


For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign FSC Wave access permissions to the Advisor user.
7. Click **Permission Set License Assignments** and then click **Edit Assignments**.
8. Enable the **Wave Embedded App** permission set license.
9. Save your changes.
10. Click **Permission Set Assignments** and then click **Edit Assignments**.
11. From Available Permission Sets, select **FSC Wave Admin** and add it to Enabled Permission Sets.
12. Save your changes.

Configure Custom Record Types for Individuals and Groups

Financial Services Cloud gives you the flexibility to configure custom individual and group record types. If your advisors have an individual or a relationship group that doesn't fit the default record type, you can configure a custom record type based on the default individual or group record type provided by Financial Services Cloud.

To configure a custom individual record type, you must first create a custom account record type using the Account (Individual) Layout and create a custom contact record type using the Contact (Individual) Layout. To configure a custom group record type, you must first create a custom account record type using the Account (Household) Layout.

1. From Setup, enter *custom* in the **Quick Find** box, then select **Custom Metadata Types**.
2. To configure an individual record type, click **Individual Record Type Mapper**. To configure a household record type, click **Group Record Type Mapper**.
3. Depending on your record type, click either **Manage Individual Record Type Mappers** or **Manage Group Record Type Mappers**.
4. Click **New**.
5. Complete the following information for the record type mapper.

 **Note:** The required information depends on the record type.

- a. Enter the label for your custom record type mapper.
The Individual Record Type Mapper Name is filled automatically based on this label. Keep it the same as the label.
 - b. For Account Record Type, enter your custom account record type name.
This name is the same as your custom record type.
 - c. Enter the account namespace for your custom record type's org.
 - d. For Contact Record Type, enter your custom contact record type name.
 - e. Enter the contact namespace for your custom record type's org.
 - f. For Account Type, enter either *Individual* or *Group*, depending on your custom record type.
6. Save your changes.
When advisors create a new account, this custom record type is available to use.

SEE ALSO:

[Create Record Types](#)

Set Up a New Lightning Page for Contact Records

When you create a Lightning record page for contacts, include the `FinServ:clientRedirect` component. This component ensures that a contact assigned to an Individual record type is redirected to the individual's page.

1. Create a contact record page for Lightning Experience.
2. In the Lightning App Builder, edit the new contact record page.


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


3. From the Lightning Components pane, drag the **FinServ:clientRedirect** component to the top of your layout so that it's the first component on the page.

 **Note:** The FinServ:clientRedirect component only facilitates the redirect. It doesn't display any data.

4. Click **Save**.
5. To exit the Lightning App Builder, click **Back** in the top right corner. Then refresh your browser.

Financial Services Cloud Alerts

Financial Services Cloud (FSC) provides a framework for alerts so advisors can get timely alerts about clients and take necessary actions. Use the Alerts API to push financial account alerts from an external system, like a transactional system, to FSC. The alert appears in FSC when an advisor views an individual's profile or a financial account page. FSC provides three alert types: Error, Warning, and Info. To test and validate alerts manually, add a custom Alerts tab to the user interface.

 **Note:** Alerts are not intended to be created manually in an org.

By default, only the System Administrator profile has access to alerts, but you can give access to the Advisor profile. For advisors to access alerts, assign the following permissions through the Advisor profile.

- For the Alert object, select **Create, Read, Edit, and View All**.
- For the Alert object layout, select **Alert Layout**.
- For the Alert object's field-level security, select **Edit Access** for the Active field and **Read Access** for all other fields, except System Source Id.
- For the Alert object's custom tab settings, select **Default On**.

YOUR FINANCIAL SERVICES CLOUD ORG

We specially set up new orgs for Financial Services Cloud, containing changes to the default configuration for Sales Cloud. Review these changes to understand the customizations for Financial Services Cloud.

[Your Org's Changes](#)

We specially set up new orgs for Financial Services Cloud, containing changes to the default configuration for Sales Cloud. Review these changes to understand the customizations for Financial Services Cloud.

[Your Org's Changes for Wave](#)

We specially set up new orgs for Financial Services Cloud, containing changes to the default configuration for Sales Cloud. Review these changes to understand the customizations for using Wave Analytics with Financial Services Cloud.

EDITIONS

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

Your Org's Changes

We specially set up new orgs for Financial Services Cloud, containing changes to the default configuration for Sales Cloud. Review these changes to understand the customizations for Financial Services Cloud.

Changes we made to the default configuration:

- Navigation Setup
 - [Navigation to Individuals or Groups](#) on page 25
- Lightning Pages Setup
 - [Home Page Includes Lightning Experience Components](#) on page 25
 - [Individual and Group Pages](#) on page 25
- B2C Lead Conversion Setup
 - [B2C Lead Record Type Sample — Retirement Planning](#) on page 26
 - [Lead Fields Mapped for Lead Conversion](#) on page 26
 - [Picklist Values for Lead Status](#) on page 26
 - [Picklist Values for Opportunity Stage](#) on page 26
- Profiles and Permissions Setup
 - [Advisor Profile Permissions](#) on page 27
- Page Layouts and Global Actions Setup
 - [Configured Related Lists on Account and Contact Page Layouts](#) on page 28
 - [Page Layout for Account-Contact Relationship](#) on page 28
- Roles and Dashboards
 - [Roles for Individuals](#) on page 29

EDITIONS

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

- [Dashboard Defaults](#) on page 29
- Roll-Up Summary Defaults
 - [Individual Roll-Ups to Groups](#) on page 28
 - [Individual and Group Roll-Up Summaries by Lookup Fields](#) on page 30

Navigation to Individuals or Groups

Standard URLs in the user interface that ordinarily point to account and contact detail pages require a different navigation path for individuals or group. When advisors interact with detail page links, you want them to navigate to an individual or group—not the individual's account or contact record. To provide this functionality, we configured an override to redirect these URLs.

To see the changes:

1. From the management settings for Contacts, go to **Buttons, Links, and Actions**.
2. Next to View, select **Edit**.
3. Notice that we have overridden the view action with a Visualforce Page by selecting **ContactDetailRedirect [FinServ_ContactDetailRedirect]** from the drop-down list.

Home Page Includes Lightning Experience Components

We configured the Home page to include the appropriate Lightning Experience components. To see the changes:

1. From Setup, enter *Lightning* in the **Quick Find** box, then select **Lightning App Builder**.
2. Next to Home, click **View**.
3. In Lightning App Builder, notice that WelathHome is the Home Page.
4. We assigned some profiles to the Home Page. To see them:
 - a. Click **Activation**.
 - b. Click **Assign this Home page to specific profiles** and then click **Next**.
 - c. Notice the profiles assigned to this Home page. You can add more profiles to this list.

If you want to add or remove Lightning components from this page, you must clone it. Click **Clone** in Lightning App Builder.

Individual and Group Pages

Financial Services Cloud uses Lightning pages for individual and group pages. We configured the client record page for individuals and groups, so advisors can access individual and group pages. Optionally, you can also customize the layout of components on individual and group pages.

To see the changes:

1. From Setup, enter *Lightning* in the **Quick Find** box, then select **Lightning App Builder**.
2. Next to Client Record Page, click **View**.

If you want to modify the Lightning page to meet your business needs, click **Clone** from Lightning App Builder, and add or remove Lightning components.

B2C Lead Record Type Sample — Retirement Planning

We added 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 *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Leads**, and then select **Record Types** from the top of the page.
3. Review the properties of the Retirement Planning record type, then use it as a model for creating your own B2C lead record types.

Lead Fields Mapped for Lead Conversion

We specified how to convert information from custom lead fields to custom contact fields when you convert a lead to a contact.

To see the changes:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Leads**, and then select **Fields and Relationships** from the top of the page.
3. In the Contact tab, notice that Created from Lead in Leads Fields is mapped to the same in Contact Fields. Also notice that the Lead Fields' **Employer** is mapped to the Contact Fields' **Current Employer**.

Picklist Values for Lead Status

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

To see the changes:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Leads**, and then select **Fields and Relationships** from the top of the page.
3. Select **Lead Status**.
4. Notice the picklist values.

Picklist Values for Opportunity Stage

We added picklist values to the Stage field to allow advisors to track open client opportunities. To see the changes:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Opportunity**, and then click **Fields and Relationships** from the top of the page.
3. Select **Stage**.
4. Notice that we created picklist values `Assessment Needed`, `Develop Proposal`, `Client Presentation`, and `Initiate Transfer`.
5. Select `Sales Processes`. Notice that we created three:
 - Opportunity Process
 - Wallet Share
 - Other values (optional)

Advisor Profile Permissions


Financial Services Cloud provides both an Advisor profile and an Advisor Access permission set. We enabled the required permissions and a field-level security setting for the Advisor profile, and for the System Administrator profile.

To see the changes:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Select the Advisor profile.
3. Note the permissions that are enabled:
 - 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, we set the field permissions for the `Type` field in the Task object. To see the changes:
 - a. From Setup, enter **Profiles**.
 - b. For both Advisor and System Administrator profiles, scroll to the Field-Level Security section.
 - c. Select **View** next to the field Task. Notice that read and write access is enabled for `Type`.
5. For both the Advisor and System Administrator profiles, we changed the record type settings for these objects. To view the changes:
 - a. From Setup, enter **Profiles**.
 - b. For both Advisor and System Administrator profiles, scroll to the Record Type Settings section.
 - c. Notice these settings:
 - Events default to *Advisor Event*
 - Leads default to *Retirement Planning*
 - Opportunities default to *Opportunity (Wallet Share)*
 - Tasks default to *Advisor Task*

You can edit the Advisor profile, but 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 some Financial Services Cloud features.

Configured Related Lists on Account and Contact Page Layouts

We added related lists to contact detail pages so that advisors can see all the individuals and groups an entity has relationships with. A related list complements the relationship information that's shown on individual and group profiles, helping advisors more easily cultivate new business through centers of influence.

To see the changes:

1. From Setup, enter **Objects** and select Object Manager.
2. Select Contact, then Page Layouts from the top of the page.
3. Next to Contact (Individual) Layout, select **Edit**.
4. Notice the **Related Contacts Related List** is added to the contact page layout, and that it contains the relevant fields.
 - Contact
 - Related Role
 - End Date
 - Active

The Related Accounts related list appears on the account page layout for business, individual, and household accounts.

Page Layout for Account-Contact Relationship

We added the fields in the account-contact relationship layout to let advisors create and maintain relationship groups.

To see the changes:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Click **Account Contact Relationship** and then click **Page Layouts**.
3. From the Page Layouts section, click **Page Layout Assignment**.
4. For the Advisor profile, notice the page layout **Account Contact Relationship Layout (Installed Package: Financial Services Cloud)** has been assigned.

Roles for Individuals

When advisors create an individual's record, they specify the individual's role within the group. 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 group members that your firm tracks.

To see the changes:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Account Contact Relationships** and then select **Fields and Relationships** from the top of the page.
3. Select **Roles**.
4. Notice that we deleted the standard Salesforce roles, and added the following roles:
 - Client
 - Dependent
 - Domestic Partner
 - Spouse

- Grantor
- Beneficiary
- Board Member
- Employee
- Trustee
- Other

Dashboard Defaults

We created dashboards to 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 dashboard in the Advisor Reports folder, 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.

Individual Roll-Ups to Groups

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.

Member Name	Role in Group	Activities & Objects to Roll Up	Primary Member	Primary Group
Phyllis Romero	Client	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

In the Create Relationship Group dialog box, the Activities & Objects to Roll Up 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:

1. From Setup, enter *Object Manager* in the **Quick Find** box, then select **Object Manager**.
2. Select **Account Contact Relationships**, then select **Fields and Relationships** from the top of the page.
3. Select the **Roll-Ups** field.

Individual and Group 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.

Your Org's Changes for Wave

We specially set up new orgs for Financial Services Cloud, containing changes to the default configuration for Sales Cloud. Review these changes to understand the customizations for using Wave Analytics with Financial Services Cloud.

Wave for Financial Services Cloud includes embedded dashboards full of insight for advisors so that they can analyze financial accounts and securities in a book of business, learn how individuals' interactions impact their revenue, and more!

- [Wave Analytics Enabled](#) on page 30
- [Permission Set License for Wave Users](#) on page 31
- [Permission Set for the FSC Wave Admin](#) on page 31
- [The FSC Wave Admin Permission Set](#) on page 31
- [Wave Analytics Integration User Profile](#) on page 31
- [Role Hierarchy](#) on page 31
- [The Advisor Wave Tab](#) on page 32
- [The Financial Services Cloud- Wave](#) on page 32
- [Advisor Wave Tab for the FSC Wave Admin](#) on page 32
- [The FSC Wave Admin Permissions](#) on page 32
- [Permission Set for the FSC Wave Advisor](#) on page 32
- [The Advisor Wave Tab for FSC Wave Advisors](#) on page 32
- [The FSC Wave Integration Permission Set](#) on page 33
- [Field-Level Security for the Analytics Cloud Security User](#) on page 33
- [View All Permissions to the FSC Wave Admin](#) on page 33
- [View Access for the Salesforce Org](#) on page 34
- [Field-Level Security Settings for analytics Cloud Integration User](#) on page 34
- [Extended Metadata Files for Wave Dashboards](#) on page 34

EDITIONS

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

Wave Analytics Enabled

We enabled Wave Analytics from Financial Services Cloud. To verify:

1. From Setup, enter *wave* in the **Quick Find** box, then select **Wave Analytics > Getting Started**.
2. Notice that Wave Analytics has been enabled. You can start it with the **Launch Analytics** button.

Permission Set License for Wave Users

To give users access to Wave for Financial Services Cloud, we enabled the Wave Analytics permission set license. To verify that the permission set license for Wave Analytics is available:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click the user name with the System Administrator profile.
3. Click **Permission Set License Assignments**.
4. Notice the **Wave Embedded App** permission set license has been assigned.
5. You can assign this permission set license for all users who need access to Wave for Financial Services Cloud.

Permission Set for the FSC Wave Admin

We created a permission set to assign to the Financial Services Cloud admin user. To view the permission set:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Admin**.
3. Notice that System Permissions and a number of apps permissions have been assigned.

The FSC Wave Admin Permission Set

We assigned the FSC Wave Admin permission set to give your Financial Services Cloud admin access to all Wave for Financial Services Cloud functionality. To see that the permission set has been assigned:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Admin** and then click **Manage Assignments**. Notice that the FSC Wave Admin is active.

Wave Analytics Integration User Profile

We enabled read and edit access on the *Type* field for the Task object so that the integration user can access the necessary Salesforce data. To see the access:

1. From Setup, enter *Profile* in the **Quick Find** box, then select **Profiles**.
2. Click **Analytics Cloud Integration User**.
3. Depending on which interface you're using, do one of the following:
 - In the Field-Level Security section, next to Task, click **View**.
 - In the **Find Settings...** box, enter *Tasks* as the name of the object and select it from the list.
4. Notice that Type has **Read Access** and **Edit Access** selected.

Role Hierarchy

We set up the role hierarchy for Wave for Financial Services Cloud so that the integration user can apply role-based security. To see the hierarchy:

1. From Setup, enter *Role* in the **Quick Find** box, then select **Roles**.
2. Click **Wave Analytics Integration** role.

Note: Role hierarchy must have at least two levels, including Analytics Integration User.

3. Notice that this role reports to the CEO. You can assign other users to the Wave Analytics Integration role from this page.

The Financial Services Cloud- Wave

The Financial Services Cloud - Wave managed package contains functionality for the embedded Wave dashboards in Financial Services Cloud. To see the Wave package in your org:

1. From Setup, enter *Installed Packages* in the **Quick Find** box, then select **Installed Packages**.
2. Look for Financial Services Cloud - Wave.

The Advisor Wave Tab

The Advisor Wave tab lets advisors access it from Financial Services Cloud. To verify the tab's configuration:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Admin** and then click **Object Settings**.
3. Click **Advisor Wave**.
4. Notice that the checkboxes for the Available and Visible columns are checked.

The FSC Wave Admin Permissions

We configured the FSC Wave Admin permission set so that the Financial Services Cloud admin can access the Advisor Wave tab from the navigation bar. We also configured the permission set so that the admin can assign the View All permission.

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Admin** and then click **Object Settings**.
3. Click **Advisor Wave** and then click **Edit**.
4. Notice that the checkboxes for the Available and Visible columns are checked.
5. Click **Object Settings**.
6. Click **Users**.
7. Notice that the checkboxes for the Read Access and Edit Access columns are checked.

Permission Set for the FSC Wave Advisor

We created the FSC Wave Advisor permission set for the Financial Services Cloud advisor user. To view it:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Advisor**.
3. On the FSC Wave Advisor page, click **System Permissions**.
4. Notice that **Use Wave Analytics** and **Download Wave Analytics Data** are selected.

The Advisor Wave Tab for FSC Wave Advisors

The Advisor Wave tab lets advisors access it from Financial Services Cloud. To view it:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Advisor** and then click **Object Settings**.
3. Click **Advisor Wave** and then click **Edit**.
4. Notice that the checkboxes for the Available and Visible columns are selected.

The FSC Wave Integration Permission Set

To give Wave for Financial Services Cloud access to all your Salesforce org data, we assigned the FSC Wave Integration permission set to the integration user. To view the assignment:

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click **FSC Wave Integration** and then click **Manage Assignments**.
3. Notice that the permission set has been assigned to the Integration User.

Field-Level Security for the Analytics Cloud Security User

We gave the Analytics Cloud Security User profile read access on the FSC Wave Permissions field to apply View All permissions.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click **Analytics Cloud Security User**.
3. Depending on which interface you're using, do one of the following:
 - In the Field-Level Security section, next to User, click **View**.
 - In the **Find Settings...** box, enter *Tasks* as the name of the object and select it from the list.
4. Notice that the FSC Wave Permissions field has **Read Access**.

View All Permissions to the FSC Wave Admin

By default, users can view data in Wave for Financial Services Cloud only if they own records or through a role hierarchy configuration. We have given Financial Services Cloud admins "View All" permissions to view all the org's data in Wave.

1. From Setup, enter *Objects* in the **Quick Find** box, then select **Object Manager**.
2. Click **User**.
3. In the User Page Layouts section, click **User Layout**. If there are multiple layouts, select the layout assigned to the System Administrator profile.
4. In the palette, notice that **FSC Wave Permissions** is under the Additional Information section.
5. If you want to assign view-all permissions to other users:
 - a. From Setup, enter *Users* in the **Quick Find** box, then select **Users > Users**.
 - b. Repeat the following steps for all users who need to view all the org's data in Wave:
 - i. Click the full name of your org's user and then click **Edit**.
 - ii. For FSC Wave Permissions, enter the text: *View ALL*.
 - c. Save your changes.

View Access for the Salesforce Org

We've enabled access for the entire Salesforce org to view Wave for Financial Services Cloud. Users who are assigned an FSC Wave permission set can access Wave for Financial Services Cloud. To view the configuration:

1. From the App Launcher menu, click **Wave Analytics**.
2. From **Apps**, hover over **Advisor Wave** and click **Share** from the dropdown list.
3. Next to **Entire Organization**, select **Viewer** from the dropdown list. Notice Viewer is selected from the dropdown list.

Field-Level Security Settings for Analytics Cloud Integration User

Notice that the object fields have the appropriate field-level security so that Wave for Financial Services Cloud can access data from your Salesforce org.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click **Analytics Cloud Integration User**.
3. In the Field-Level Security section, next to Account, click **View**.
4. Notice that **Read Access** is selected for all fields. For fields that don't have read access enabled, click **Edit** and select **Read Access**.
5. Notice that the following objects also have read access.
 - Contact
 - Event
 - Financial Account
 - Financial Goal
 - Financial Holding
 - Opportunity
 - Revenue
 - Task

Extended Metadata Files for Wave Dashboards

We uploaded extended metadata (XMD) files to ensure that all custom colors, labels, and quick actions are available for dashboards in Wave for Financial Services Cloud.

To view the downloaded XMD files:

1. From Financial Services Cloud Setup, enter *Static* in the **Quick Find** box, then select **Static Resources**.
2. Notice the resource **finservwaveresources**.
3. If you need to download the resources .zip file, click **View File** and extract it.

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.
- An individual's record created in Salesforce sync with Outlook in both directions.
 - ✍ **Note:** Creating an individual's record in Outlook isn't currently supported.
- Using the Salesforce for Outlook side panel, your users can add emails, events, and tasks to individuals. When emailing an individual, users can add the email to the individual's record. When sending or receiving email about an individual, users can associate the email with one or more of the individuals involved. Associating individuals with Outlook calendar events and Outlook tasks works similarly.
- Added emails, events, and tasks are displayed in the Activity tab of the individual's profile.
- Emails, tasks, and events are associated with the contact part of the individual's record.
 - 💡 **Tip:** Sometimes, the side panel displays an individual'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 individual.

EDITIONS

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

FINANCIAL SERVICES CLOUD AVAILABILITY AND LIMITATIONS

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

EDITIONS

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Supported Browsers

Financial Services Cloud supports 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.

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

General Sales Cloud and Service Cloud Compatibility

The Financial Services Cloud documentation describes the Sales Cloud and Service Cloud functionality with which the Financial Services Cloud features work. Salesforce makes no representation regarding Financial Services Cloud features functioning with any other Sales Cloud and Service Cloud functionality not expressly stated in the Financial Services Cloud documentation. Use of Financial Services Cloud features with such other Sales Cloud or Service Cloud functionality may not be possible or may require additional configuration steps.

Features Not Supported with Financial Services Cloud

- Duplicate Management isn't supported.
- Accessibility features aren't incorporated.
- Shared Activities aren't supported in group roll-up summaries.


Feature Limitations

- When users create or edit individuals' group memberships, group roll-up summaries are updated automatically, except when the following occurs.
 - If the group membership is updated via APIs, Data Loader, or other methods, roll-up summary data is not updated to reflect the change. In the user interface, if a user changes the group that an individual belongs to, group roll-up summary data is updated automatically.
 - The user interface enforces a validation rule that an individual can't be a member of multiple groups. This validation rule doesn't apply to data uploads via APIs, Data Loader, or other methods.
 - If an individual is made a member of multiple groups, group roll-up summary data is reflected for one group 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 individual and group profiles on the Salesforce1 mobile app is not fully supported. For more information, see [Modify the Salesforce1 Navigation Menu](#).
- When multicurrency is enabled, note the following limitations.

Financial Services Cloud Availability and Limitations

- Advanced currency management is not available.
- The `Currency Iso Code` field must be included on page layouts that have a currency field.
- For each user, the user currency must correspond 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, Portuguese (Brazil), and Spanish is supported, with the following exceptions.
 - The names of the packaged Advisor and Client Associate profiles are only in English.
 - For Opportunities, the names of the General record type and Opportunity Process are only in English.
 - For Leads, the names of the General record type and Lead Process are only in English.
 - All record type descriptions are only in English.
 - Financial Services Cloud custom tab labels on the individual and group profile pages are only in English. To change tab labels on the profile pages, edit the labels from a custom client record page in the Lightning App Builder.
- Person accounts are not supported with Financial Services Cloud.
- Financial Services Cloud installation is not supported on an org with a previously installed version of the Wealth Management app.
- The Birthdays card and the Upcoming RMDs card on the Home page don't work properly if their default list views are deleted.
- Activity roll-up fields to a group are not supported when **Allow Users to Relate Multiple Contacts to Tasks and Events** is enabled.

Advisor Wave Limitations

- Available only in Lightning Experience.
- Financial Services Cloud grants you the ability to use Advisor Wave with restrictions. The following features require an extra license. Contact your Salesforce representative for details.
 - Bring in data from external data sources.
 - Bring in data from Salesforce standard objects that are not part of the Advisor Wave preconfigured dataset.
 - Include more than 25 million rows of data in Wave Analytics. Contact your representative if you need more capacity.
 - Create custom Wave Analytics applications.
- Available in English only. Localization is not supported. All users see the same date, time, and number formats, regardless of their own locale and language settings.
- Multicurrency is not supported. When Wave Analytics extracts your org's default currency, it uses the currency for monetary values and doesn't convert to another currency. Labels with the '\$' symbol are not converted to reflect the default currency.
- Each field on an Advisor Wave dashboard must have a value in at least one record.
- Sharing rules and field-level security that were implemented in a Salesforce object aren't preserved when the data is loaded into a Wave Analytics dataset.
-  **Note:** The record-level security predicate is applied when users can only view records owned by themselves or their subordinates.
- Encrypted data is visible if Shield encryption is enabled on fields and exposed in Advisor Wave dashboards. Encrypted data is not visible if the integration user has decrypted access to the data.
- Search in filters is both case-sensitive and accent-sensitive. For example, using the filter "Andre" does not return "André" in the results.
- At least one event and one task connected with an opportunity are required to run dataflows.
- Sorting data within datasets might not work as expected.

Financial Services Cloud Availability and Limitations

- Accessibility features haven't been incorporated into Wave Analytics.

INDEX

A

Alerts [23](#)

C

Contact records
Set up new contact record page in Lightning Experience [22](#)

D

Data Loader
recommended data upload sequence [12](#)
relate individuals to groups [15](#)
upload data for individuals [12](#)
upload financial account data [16](#)
upload household data [14](#)

Data model
assets [5](#)
diagram [2](#)
goals [5](#)
household [6](#)
individual client [3](#)
individual's financials [4](#)
liabilities [5](#)
party model [7](#)
revenue [5](#)
view with Schema Builder [3](#)

F

Financial Services Cloud
implementation considerations [10](#)

L

Leads
configure company name override for leads [21](#)

Lightning Components [10](#)

Lightning Experience [10](#)

Limitations [36](#)

N

Navigation
modify Salesforce1 navigation menu [18](#)

P

Page Layout
add actions to custom object page layouts [19](#)

R

Record type
configure custom record type [22](#)

Roles
configure Reciprocal Roles [20](#)
customize roles for individuals [20](#)

S

Salesforce Classic [10](#)

Salesforce Shield
event log files [9](#)
event monitoring considerations [9](#)
Platform Encryption considerations [8](#)

Systems integration
Salesforce for Outlook [35](#)

U

Users
create admin user [21](#)

W

Wave for Financial Services Cloud [30](#)