Financial Services Cloud Quick Start

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Determine How Your Org Is Set Up

To get started with your Financial Services Cloud (FSC) org, determine how your org is set up.

In most cases, your org already has Financial Services Cloud and Wave for Financial Services Cloud (Enterprise Edition and Unlimited Edition only) installed and basic configuration completed. If your org doesn't have Financial Services Cloud and Wave for Financial Services Cloud installed yet, then install the packages and complete some post-install tasks.

To determine if your org has Financial Services Cloud and Wave for Financial Services Cloud installed, do the following:

1. Log in to your Salesforce org.

2. From the App Launcher menu, verify that Financial Services Cloud is available.

3. For Wave for Financial Services Cloud, verify that the **Advisor Wave** tab appears in the navigation bar. Wave for Financial Services Cloud is only available in Enterprise and Unlimited Editions.

   If Financial Services Cloud and Wave for Financial Services Cloud are installed in your org, then continue to the next section, Register a My Domain Subdomain.

   ⊘ **Important:** If Financial Services Cloud and Wave for Financial Services Cloud are not installed, then use the links to the Financial Services Cloud packages or Wave for Financial Services Cloud package under the Product Specific Terms section within your Order Form.

   Refer to this article for the installation process.

SEE ALSO:

Register a My Domain Subdomain

Register a My Domain Subdomain

Register a subdomain with the My Domain wizard and then deploy it. To use Lightning components, you must have My Domain enabled.

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

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

   The subdomain appears in your firm's login URL as `https://subdomain.my.salesforce.com/`. It can't contain these reserved words:

   - www
   - salesforce
   - heroku

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

   - root
   - status

3. Select **Check Availability**. If your name is already taken, choose a different one.

4. Select **Register Domain**.

   You can refresh the page to check the registration status, or wait for the confirmation email. It can take up to 3 minutes.

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

5. Click **Log In**.

6. (Optional) Continue with mobile phone registration.

7. If you land on the Salesforce home page, return to **My Domain** in Setup.

8. Click **Deploy to Users**, and then confirm that you want to make the permanent change of deploying the custom domain to users.

Create an Advisor User

Create a user and assign the required permissions so an advisor can access Financial Services Cloud.

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. 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 Advisor** and add it to Enabled Permission Sets.

12. Save your changes.

Set Up and Start Dataflow

Schedule and start the dataflow so that your data can be refreshed daily in Wave for Financial Services Cloud.

1. From the App Launcher menu, click **Wave Analytics**.

2. From the Wave Analytics Setup menu (⚙), click **Data Manager**.

3. From the dropdown list, select **Dataflow View**.

4. Next to the FinServWaveExt dataflow, select **Schedule** from the dropdown list.

5. Schedule the dataflow for every 1 day at 4 AM, or as needed (hourly or daily).

6. Save your changes and click **Done**.

7. Next to the FinServWaveExt dataflow, select **Start** from the dropdown list.
   Dataflow is now running and could take time to finish depending on the size of the Wave datasets. You can check the status of the dataflow by switching to the Jobs View. Data must be present in the org for dataflow to work. Use the same dataflow if you start another dataflow manually.

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