salesforce

Financial Services Cloud Upgrade Guide

Salesforce, Spring ’17

@salesforcedocs

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POST-UPGRADE TASKS

If you're upgrading from Financial Services Cloud Winter '17 to Spring '17, complete these setup and configuration tasks.

ⓘ **Important:** You can add processes or record types for Lead and Opportunity objects, but the packaged processes and record types must remain active for the upgrade. Optionally, you can remove them from the respective user profiles.

Configure the Client Page

Financial Services Cloud uses Lightning pages for individual and group pages. Configure 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.

Update Admin and Advisor Profiles

Part of the upgrade process is updating the profiles for Financial Services Cloud admins and advisors.

Update Page Layouts

Update page layouts so advisors can reactivate account contact relationships using the standard related lists.

Relationship Groups Setup

As part of the upgrade tasks, set up relationship groups to let advisors add individuals to more than one group, add businesses to groups, and visualize relationships.

Synchronize Account and Contact Owners

By default, all new account and contact owners for individuals are synchronized automatically. You can schedule an Apex job to make sure that each existing individual has the same owner on account and contact details.

Update Roles for Account Contact Relationships

As an optional part of the upgrade process, you can give advisors more roles that represent the types of group members that your firm tracks.

Update Labels and Colors for Wave for Financial Services Cloud

For orgs that have Wave for Financial Services Cloud configured, update the extended metadata (XMD) files for custom colors and labels on the dashboards.

Configure Alerts

If you're using a custom client record page, configure it as part of the upgrade tasks to provide advisors timely alerts on an individual's profile and financial accounts from core financial systems.

Configure the Client Page

Financial Services Cloud uses Lightning pages for individual and group pages. Configure 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.

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

EDITIONS

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

4. From the Org Default tab, click **Assign as Org Default**.
5. Save your changes.
6. After you finish activation, click **Back** to exit Lightning App Builder and then refresh your browser.

   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.

Update Admin and Advisor Profiles

Part of the upgrade process is updating the profiles for Financial Services Cloud admins and advisors.

Complete these steps for the Admin and Advisor profiles, so they can use the relationship group builder to add businesses to groups and select a group as a primary group for group members.

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
2. Click **Advisor**.
3. From Field-Level Security, next to Account Contact Relationship, click **View**.
4. Click **Edit**.
5. For Include in Primary Group, select **Edit Access**.
6. For Primary Group, select **Edit Access**.
7. Save your changes.
8. Repeat these steps for the Admin profile.

EDITIONS

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Update Page Layouts

Update page layouts so advisors can reactivate account contact relationships using the standard related lists.

1. Add the Related Contacts related list to these account layouts: Account (Household) Layout, Account (Business) Layout, Account (Institution) Layout.
   a. From Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**.
   b. Click **Account** and then click **Page Layouts**.
   c. Click a layout to upgrade.
      - **Account (Household) Layout**
      - **Account (Business) Layout**
      - **Account (Institution) Layout**

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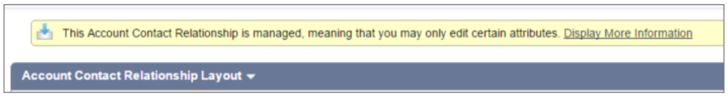
2. Add the Related Accounts related list to these contact layouts: Contact (Individual) Layout and Contact (Business) Layout.
   a. From Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**.
   b. Click **Contact** and then click **Page Layouts**.
   c. Click a layout to upgrade.
      - **Contact (Individual) Layout**

  - **Contact (Business) Layout**

3. Assign the managed Account Contact Relationship layout to the Advisor profile:
   a. From Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**.
   b. Click **Account Contact Relationship** and then click **Page Layouts**.
   c. From the Page Layouts section, click **Page Layout Assignment**.
   d. Click **Edit Assignment**.
   e. For Profiles, click **Advisor**.
   f. For Page Layout To Use, select **Account Contact Relationship Layout (Installed Package: Financial Services Cloud)**.
   g. Save your changes.
4. Add fields to the managed Account Contact Relationship layout.
   a. From the Account Contact Relationship object page, click one of the Account Contact Relationship layouts.
   b. Verify that you are updating the managed Account Contact Relationship layout.

   Note: The managed Account Contact Relationship layout displays a message that the layout is managed.



This Account Contact Relationship is managed, meaning that you may only edit certain attributes. Display More Information

Account Contact Relationship Layout ▾

   c. In the palette, select the **Fields** category and then drag **Primary Group** to under the Active field.
   d. Drag **Include in Primary Group** to the Account Information section, next to the Account field.
   e. Save your changes.
5. Update the Securities layout.
   a. From Custom Object Layouts, click **Securities Layout**.
   b. Drag these fields to the Information section:
      - **Asset Category**
      - **Asset Category Name**
      - **Asset Class**
   c. Save your changes.

Relationship Groups Setup

As part of the upgrade tasks, set up relationship groups to let advisors add individuals to more than one group, add businesses to groups, and visualize relationships.

EDITIONS

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Enable Multiple Relationship Groups

Let advisors add a person to more than one relationship group.

Configure the Custom Client Page for Relationship Groups

Add Lightning components to a custom client record page to let advisors add businesses to groups and visualize relationships.

Set Up Field Sets for Relationship Groups

Create custom field sets to include information about relationship groups and group members on an individual profile's Relationships tab.

Enable Multiple Relationship Groups

Let advisors add a person to more than one relationship group.

EDITIONS

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Note: The Multiple Relationship Groups feature is enabled by default for new orgs.

1. From Setup, enter *`custom`* in the `Quick Find` box, then select **Custom Settings**.
2. Next to Industries Application Config, click **Manage**.
3. Click **Edit**.
4. Select **Multiple Relationship Groups**.
5. Save your changes.

Configure the Custom Client Page for Relationship Groups

Add Lightning components to a custom client record page to let advisors add businesses to groups and visualize relationships.

EDITIONS

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The packaged client record page already includes the Lightning components for relationship groups. If you're using a custom client record page, you must add the Lightning components.

1. From Setup, enter *`Lightning`* in the `Quick Find` box, then select **Lightning App Builder**.
2. Next to your custom client record page, click **Edit**.
3. From Lightning App Builder, click the **Relationships** tab on the client record page.
4. Drag the relationship groups component to the client record page under the relationship members component.
5. Drag the relationship map component to the client record page above the relationship members component.
6. Save your changes.
7. To exit Lightning App Builder, click **Back** and then refresh your browser.

Set Up Field Sets for Relationship Groups

Create custom field sets to include information about relationship groups and group members on an individual profile's Relationships tab.

EDITIONS

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Complete the following steps from Salesforce Classic.

1. Create an account field set to include account information on the relationship groups component on the Relationship tab.
    a. From Setup, enter *`account`* in the `Quick Find` box, then select **Field Sets**.
    b. Enter the field set information.
        - Field Set Label: *`Relationship Groups`*
        - Field Set Name: *`WM_Client_Relationship_Groups`*

- Where is this used? `Client profile's Relationships tab`

c. Save your changes.

d. In the palette, select the **Account** category, and then drag the following fields to In the Field Set.

- **Account Name**
- **Last Interaction**
- **Total Financial Accounts**

e. In the palette, select the **Record Type ID** category, and then drag the **Name** field to under Account Name in the In the Field Set list.

f. Save your changes.

2. Create an account field set to include account information on the relationship members component on the Relationship tab.

a. From Setup, enter `account` in the `Quick Find` box, then select **Field Sets**.

b. Enter the field set information.

- Field Set Label: `Relationship Group Members`
- Field Set Name: `WM_Client_Relationship_Group_Members`
- Where is this used? `Client profile's Relationship Groups table`

c. Save your changes.

d. In the palette, select the **Account** category, and then drag the following fields to In the Field Set.

- **Account Name**
- **Category**
- **Total Financial Accounts**

e. In the palette, select the **Record Type ID** category, and then drag the **Name** field to under Account Name in the In the Field Set list.

f. Save your changes.

3. Create a contact field set to include contact information on the relationship members component on the Relationship tab.

a. From Setup, enter `contact` in the `Quick Find` box, then select **Field Sets**.

b. Enter the field set information.

- Field Set Label: `Relationship Group Members`
- Field Set Name: `WM_Client_Relationship_Group_Members`
- Where is this used? `Client profile's Relationship Groups table`

c. Save your changes.

d. In the palette, select the **Contact** category, and then drag the **Name** field to In the Field Set.

e. In the palette, select the **Record Type ID** category, and then drag the **Name** field to under Name in the In the Field Set list.

f. In the palette, select the **Account ID** category, and then drag the following fields to under Record Type ID > Name in the In the Field Set list.

- **Last Interaction**
- **Total Financial Accounts**

  g. Save your changes.

Synchronize Account and Contact Owners

By default, all new account and contact owners for individuals are synchronized automatically. You can schedule an Apex job to make sure that each existing individual has the same owner on account and contact details.

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1. From Setup, enter `apex` in the `Quick Find` box, then select **Apex Classes**.
2. Click **Schedule Apex**.
3. Enter a job name.
4. For Apex Class, look up and select **AccountContactSyncSchedulable**.
5. Schedule the Apex class to run for one day.

   Note: Make sure that the preferred start time is in the future.

6. Save your changes.

   To monitor the job status, enter `apex` in the `Quick Find` box, then select **Apex Jobs**.

Update Roles for Account Contact Relationships

As an optional part of the upgrade process, you can give advisors more roles that represent the types of group members that your firm tracks.

EDITIONS

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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 roles as needed.

   We recommend these roles:

   - Grantor
   - Beneficiary
   - Board Member
   - Employee
   - Trustee

4. Save your changes.

Update Labels and Colors for Wave for Financial Services Cloud

For orgs that have Wave for Financial Services Cloud configured, update the extended metadata (XMD) files for custom colors and labels on the dashboards.

EDITIONS

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

1. Download the XMD files.

   a. From Financial Services Cloud Setup, enter `Static` in the `Quick Find` box, then select **Static Resources**.
   b. Click **finservwaveresources**.
   c. Click **View File** to download the .zip file containing the XMD files.
   d. Extract the .zip file, and record the location of the folder.

2. Update the datasets.
   a. From the App Launcher menu, select **Wave Analytics**.
   b. Click **Advisor Wave** and then click **Datasets**.
   c. Next to the Account_Contact dataset, hover and select **edit** from the dropdown list.
   d. Under Add Extended Metadata File (JSON), click **Select file or drag here**.
   e. From the extracted folder, upload the Account_Contact.xmd file.

      Note: The XMD file name corresponds with the dataset name. For example, the Account_Contact dataset corresponds with Account_Contact.xmd.

   f. Click **Update Dataset**.

3. Repeat the previous steps to update the following datasets.
   - Account_Revenue
   - Event_Account_Contact
   - FinAcc_Account_Contact
   - FinancialHoldings
   - FinGoal_Account_Contact
   - Task_Account_Contact

Configure Alerts

If you're using a custom client record page, configure it as part of the upgrade tasks to provide advisors timely alerts on an individual's profile and financial accounts from core financial systems.

1. From Setup, enter `Lightning` in the `Quick Find` box, then select **Lightning App Builder**.
2. Next to a custom financial account page, click **Edit**.
3. From Lightning Components, drag the alert component between the Details tab and the record details of your page.

   Note: The alert component has a prefix, for example, FinServ:alert.

4. Save your changes.
5. Next to a custom client record page, click **Edit**.
6. From Lightning Components, drag the alert component between the Details tab and the record details of your page.
7. Save your changes.

8. Click **Back** to exit Lightning App Builder and then refresh your browser.

SEE ALSO:

Financial Services Cloud Alerts

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