
Financial Services Cloud Upgrade Guide

Salesforce, Spring '18




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POST-UPGRADE TASKS

Financial Services Cloud Spring '18 is now available. These setup and configuration tasks are optional.

 **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 profiles.

[Enable the Expressed Interests Component](#)

This component makes it easy to see all open referrals based on expressed interests on the client profile, as well as the potential value of referrals. Without reentering data, users can capture customer needs with a new standard action on this auto-populated referrals component.

[Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring](#)

[Enable the Insurance Console \(Optional\)](#)

The Insurance Console, with custom fields for policy term and total premium, provides a customized view of insurance policyholders.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable the Expressed Interests Component

This component makes it easy to see all open referrals based on expressed interests on the client profile, as well as the potential value of referrals. Without reentering data, users can capture customer needs with a new standard action on this auto-populated referrals component.

 **Note:** If you haven't made modifications to the unmanaged extension package, uninstall and reinstall it. No additional setup steps are required. If you have made modifications to unmanaged extension package, follow these setup steps.

 **Note:** Person accounts aren't currently supported in the Expressed Interests Component.

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Create a Field Set for the Expressed Interests Component

 **Note:** Complete these steps in Salesforce Classic.

1. From **Setup**, enter *Object* in the Quick Find box, select **Objects**, and then select the **Lead** object.
2. From the management settings for the **Lead** object, go to **Field Sets**, and then click **New**.
3. Enter a **Field Set Label:** *LBLLabel_Field_Set_Referrals_Expressed_Interest*.
4. Enter a **Field Set Name:** *FSC_Referrals_Expressed_Interest*.
5. In the **Where is this used?** area, provide a description: *Client profile's Referrals tab*.
6. Save your changes.
7. Drag the following fields from the object palette and drop them in the field set container: **Name, Expressed Interest, Potential Value, Lead Status, and Last Modified Date**.

8. Save your changes.

Add the Expressed Interests Component to Account Lightning Pages

 **Note:** Complete these steps in Lightning Experience.

1. Update an Account Lightning page.
 - a. In Lightning App Builder, select a page layout, such as **Banking Individual Page - Two Column**.
 - b. Select the **Referrals** tab.
 - c. Drag the **Referrals Expressed Interest List - Financial Services Cloud** component onto the page layout. You can retitle it if you like.
 - d. Select the number of records you want to show.
 - e. The default field set displayed is **FSC_Referrals_Expressed_Interest**.
 - f. Save your changes.
2. Update the Referral Record layout.
 - a. In **Setup**, enter *Object Manager*.
 - b. Select **Lead**.
 - c. Select **Page Layouts**.
 - d. Choose **Lead (Referral) Layout**.
 - e. Click **Edit**.
 - f. In the Quick Find box in the **Page Layouts** modal, enter *Related Account*.
 - g. Drag the **Related Account** field set to the **Referral Information** section.

Enable Edit Access to the Related Account Field on Lead

Financial Services Cloud permission sets provide access to the Related Account field. To give a user profile access to the Expressed Interests component, add edit access to the Related Account field on Lead.

Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring

Follow these steps to add the picklist value to the referrals rollup.

1. From **Setup**, enter *Object Manager* in the Quick Find box, and then select **Account Contact Relationship**.
2. Select **Fields & Relationships**, and then click **Roll-Ups**.
3. In the **Values** section, click **New**.
4. Enter *Referrals* in the **Roll-Ups** field.
5. Save your changes.


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Enable the Insurance Console (Optional)

The Insurance Console, with custom fields for policy term and total premium, provides a customized view of insurance policyholders.

-  **Note:** Follow these optional setup steps if you'd like to give users access to the Insurance Console.

Assign the Insurance Access Permission Set (Optional)

The Insurance Access permission set provides access to the Insurance Console.

1. From **Setup**, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.
2. Select **Insurance Access**.
3. Select **Manage Assignments**.
4. Select the users to whom you want to assign the permission set.
5. Save your changes.

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Enable the Insurance Compact Layouts (Optional)

Enable the insurance compact layouts for the relevant record types.

1. From **Setup**, enter *Object Manager* in the Quick Find box, select **Account** and then select **Compact Layouts**.
2. In the **Compact Layout Assignment** modal, select the **Individual Insurance Compact Layout** for the **Individual Record Type**. Select the **Household Insurance Compact Layout** for the **Household Record Type**.
3. Save your changes.

Enable Rollups for Total Premiums (Optional)

1. Create a configuration for client rollups.
 - a. In **App Launcher**, select *Rollup By Lookup Configurations*.
 - b. Click **New**.
 - c. In Rollup By Lookup Configuration Name, enter *RBLForFARForInsurancePremium*.
 - d. Deselect the **Active** checkbox.
 - e. In Field To Roll Up From, enter *FinancialAccount__r.Premium__c*.
 - f. In From Object, enter *FinancialAccountRole__c*.
 - g. In Lookup Field, enter *RelatedAccount__c*.
 - h. In Rollup Operation, select *Sum*.
 - i. In Field To Roll Up To, enter *TotalPremium__c*.
 - j. In To Object, enter *Account*.
 - k. In Where Clause, enter *1*.
 - l. Save your changes.

- m. From the **Related** Tab, click **New** in the Rollup By Lookup Filter Criteria related list.
 - n. In Field Name, enter *FinancialAccount__r.RecordTypeName__c*.
 - o. In Operator, select **equals**.
 - p. In Field Value, enter *InsurancePolicy*.
 - q. Save your changes.
 - r. In the App Launcher, select **Rollup by Lookup Configurations**.
 - s. Click on **RBLForFARForInsurancePremium**, and then click **Edit**.
 - t. Select the **Active** checkbox.
 - u. Save your changes.
2. Create a configuration for group rollups.
 - a. In the App Launcher, select **Rollup by Lookup Configurations**.
 - b. Click **New**.
 - c. In Rollup By Lookup Configuration Name, enter *RBLForInsurancePremiumHH*.
 - d. Select the **Active** checkbox.
 - e. In Field To Roll Up From, enter *Premium__c*.
 - f. In From Object, enter *FinancialAccount__c*.
 - g. In From Record Type, enter *InsurancePolicy*.
 - h. In Lookup Field, enter *Household__c*.
 - i. In Rollup Operation, select *Sum*.
 - j. In Field To Roll Up To, enter *TotalPremium__c*.
 - k. In To Object, enter *Account*.
 - l. Save your changes.

Provide Edit Access to the Total Premium Custom Field (Optional)

1. From **Setup**, enter *Profiles* in the Quick Find box, and select **Profiles**.
2. Select **System Administrator**.
3. Click **View** near Account for FLS.
4. Click **Edit**.
5. Provide Read and Edit access for Total Premium.
6. Save your changes.
7. Repeat these steps for any other profiles in use, such as Advisor and Personal Banker.

Add the Insurance Policy Component to a Lightning Page (Optional)

Follow these steps to add the Insurance Policy component to a Lightning page.

1. In Lightning **App Builder**, select a page layout, such as **Banking Individual Page - One Column**.
2. Select the **Financials** tab.

3. Drag the **Insurance Policy - Financial Services Cloud** component onto the page layout.
4. Save your changes.