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Financial Services Cloud is the platform designed for high-touch client relationship management. It empowers your advisors, personal bankers, tellers, or anyone interacting with clients to deliver the personalized, proactive service that clients expect. Accelerate user 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 users 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 to streamline implementation for financial institutions. Install the Financial Services Cloud managed package and the unmanaged extension package. Connect data from your banking, portfolio management, financial planning, and other systems. And then configure the app to suit how your users like to work.

For information about what’s new in this release, see Salesforce Release Notes.
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 user 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 users are going to be working in Lightning Experience, the 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 user 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 other features that are 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
A New Way of Working in Lightning Experience

Your users are going to be working in Lightning Experience, the 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.

You can complete nearly all tasks described in this guide using the Setup tools in Lightning Experience. If you need 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.

Many Lightning components aren’t editable because they’re part of the managed package’s Lightning component bundle. To see 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

EDITIONS

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
Use person accounts to store customer information in a single record in Financial Services Cloud. Person accounts bring together fields from Account and Contact to provide a completely customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing.

Person accounts are available in Financial Services Cloud trial orgs and new installations. By default, Financial Services Cloud enables person accounts in trial orgs and enables the individual object model in new installations. However, it’s easy to enable person accounts or the individual object model with a simple setup step.

If you currently use person accounts in your org, you may have the option of upgrading to Financial Services Cloud without migrating to a new org.

**Note:** Review your customizations (to components and triggers, for example) before upgrading to person accounts in Financial Services Cloud within your current org or in a new org.

**Implementation Considerations for Person Accounts in Financial Services Cloud**
You can choose either the individual object model or person accounts in Financial Services Cloud. Decide which object model is right for your company.

**Enable Person Accounts in Financial Services Cloud**
Before you configure person accounts for Financial Services Cloud, create a support ticket to enable person accounts for your org.

**Considerations for Transforming the Individual Data Model to Person Accounts in Financial Services Cloud**
Review these considerations to determine whether transforming the individual data model to person accounts in Financial Services Cloud is right for your company.

**Transform the Individual Data Model to Person Accounts in Financial Services Cloud**
Complete these steps before transforming the individual data model to person accounts in Financial Services Cloud.

**Disable Person Accounts in Financial Services Cloud**
You can choose either the individual object model or person accounts in Financial Services Cloud. If you choose the individual object model, follow these steps to disable person accounts.

SEE ALSO:
- Person Accounts
- Considerations for Using Person Accounts
Implementation Considerations for Person Accounts in Financial Services Cloud

You can choose either the individual object model or person accounts in Financial Services Cloud. Decide which object model is right for your company.

Once enabled, you cannot deactivate person accounts in your org. This Salesforce restriction is not limited to Financial Services Cloud.

Both the individual object model and person accounts are compatible with the Financial Services Cloud data model, Intelligent Need-Based Referrals and Scoring, and the relationship framework.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Individual Object Model</th>
<th>Person Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single object experience for creating, editing, and accessing information</td>
<td>Partial Creation—Client Profile Builder View and Edit—The custom unified profile displays distinct Account and Contact sections.</td>
<td>Yes</td>
</tr>
<tr>
<td>Fully customizable UI that permits intermixing fields from Account and Contact</td>
<td>Partial The unified client profile displays Account and Contact fields in distinct sections.</td>
<td>Yes</td>
</tr>
<tr>
<td>Single-step to follow Chatter</td>
<td>No You must follow Account and Contact separately. Contact can be followed through Contact record in Salesforce Classic only.</td>
<td>Yes</td>
</tr>
<tr>
<td>Duplicate management</td>
<td>Partial Rule-based detection and prevention are supported. Record merge is not supported.</td>
<td>Yes</td>
</tr>
<tr>
<td>Single-step to share records</td>
<td>Partial Account and Contact must be shared separately.</td>
<td>Yes</td>
</tr>
<tr>
<td>Community user enablement from Lightning Experience</td>
<td>Partial Through Contact record in Salesforce Classic only.</td>
<td>Yes</td>
</tr>
<tr>
<td>Client Segmentation Analytics App certified for use</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Editions

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
Enable Person Accounts in Financial Services Cloud

Before you configure person accounts for Financial Services Cloud, create a support ticket to enable person accounts for your org.

1. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
2. In the list of custom settings, click Manage next to the Use Person Accounts custom settings.
3. Click Edit next to Use Person Account. If no record exists, create a new entry and label it Use Person Account.
   
   Note: The label must be Use Person Account (singular), not Use Person Accounts (plural).

4. Click Enable and Save.
5. After Person Accounts are enabled, remove all Individual record type assignments from all profiles and enable person account record types for relevant profiles.
   
   a. From Setup, enter Profiles in the Quick Find box, and select Profiles.
   
   b. Select the Advisor profile.
   
   c. In Record Type Settings, click Edit for Accounts.
   
   d. Remove the Individual record type.
   
   e. Add the Person Account record type.
   
   f. Set default record type to Household.
   
   g. Set Business Account Default Record Type to Business.
   
   h. Set Person Account Default Record Type to Person Account.
   
   i. Save your changes.
   
   j. Repeat for all profiles in use.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Individual Object Model</th>
<th>Person Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISV packages built on the Financial Services Cloud ecosystem</td>
<td>Partial</td>
<td>Partial</td>
</tr>
<tr>
<td>Not all packages are built to support the individual object model.</td>
<td></td>
<td>Not all packages are built to support person accounts.</td>
</tr>
<tr>
<td>Packaged page layouts and record types</td>
<td>Yes</td>
<td>Partial</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New trial orgs created after the Spring ’18 release only.</td>
</tr>
<tr>
<td>Available in Advisor Partner and Customer communities</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Optimized for the Salesforce mobile app</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>The individual object model is displayed as distinct Account and Contact records.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

EDITIONS

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
Configure Person Account Record Types in Financial Services Cloud

1. From Setup, enter Custom Metadata in the Quick Find box, then select Custom Metadata Types.
2. In the list of custom metadata types, click Manage Records next to the Individual Record Type Mapper custom settings.
3. Click New to create the mapping record.
4. Enter Person Account as the label for the mapping record.
5. You must have at least one mapping record using this label. This mapping is used by Financial Services Cloud to create records.
6. For Individual Record Type Name, enter a name for the record type. This field is for internal use only. The name can be the same as the label.
7. In the Account Record Type field, enter the name of a valid person account record type that you want to use in this mapping. You can use the default person account record type or one that you’ve created.
8. In the Record Type Namespace (Account) field, enter the namespace for your org.
9. Leave the Contact Record Type field blank. Note: Person accounts don’t use the contact record type.
10. Leave the Record Type Namespace (Contact) field blank.
11. Save your work.

Set Up Lead Conversion and Referral Management for Person Accounts

Deactivate the company override setting in B2C Lead Conversion.

1. From Setup, go to Custom Settings.
2. Click Manage against B2C Lead Company Name Config.
3. Select Edit against System Administrator. Deselect the Override Company Name checkbox.
4. Save your changes.
5. Repeat step 3 for all profiles configured in this custom setting, including Advisor and Personal Banker.

Considerations for Transforming the Individual Data Model to Person Accounts in Financial Services Cloud

Review these considerations to determine whether transforming the individual data model to person accounts in Financial Services Cloud is right for your company.
Review your technical architecture and the customizations that you’ve made to the following to ensure compatibility with person accounts:

- Triggers, flows, and workflow rules
- Components
- Reports

Before switching from the individual data model to person accounts, be aware of the following:

- **Sharing**—If you enable person accounts in your org, your options for Organization-Wide Defaults (OWD) sharing are limited to either Controlled by Parent on Contact or Private on Account and Contact.
- **Business processes**—If your org includes business accounts, contacts, and person accounts, consider whether you need to write separate business processes or workflows.
- **Integration**—Integrations between Salesforce and third-party systems via the API use the Account object to access person accounts. You can query and update the Contact object via the API, but person accounts are created with the Account object.
- **AppExchange packages**—Many applications designed for the Account and Contact objects work with person accounts. Check whether your third-party applications support person accounts.

### Transform the Individual Data Model to Person Accounts in Financial Services Cloud

Complete these steps before transforming the individual data model to person accounts in Financial Services Cloud.

**Note:** Perform these steps in a sandbox org first. Transforming the individual data model to person accounts in your production org is irreversible.

**Note:** Enable person accounts in Financial Services Cloud. See Leverage Person Accounts in Financial Services Cloud.

1. Contact support to set up person accounts in your org.
2. Perform a data backup.
3. Enable person accounts in Financial Services Cloud with the Use Person Accounts custom setting.
4. Configure your Person Account record types in the Individual Record Type Mapper.
5. Validate and modify your data to meet these requirements before proceeding.
   a. Only individual accounts with single direct ACR can successfully convert to person accounts. For each person account, the account record can have only 1 contact record.
   b. The Account and Contact must have the same record owner.
   c. The Account and Contact must use the same currency value (if applicable).
   d. Both the Parent Account field on the account and the Reports To field of the contact must be blank.
   e. The account can't be the parent account of any other account records.
   f. No other contact records can report to the contact.
6. When converting, the contact name is mapped to person accounts. If you’ve used a middle name, salutation, and suffix, they are included in the name of your person account.

Export all individuals that you want to transform to person accounts.
Leverage Person Accounts in Financial Services Cloud

Note: Perform these steps in a sandbox org first. Transforming the individual data model to person accounts in your org is irreversible.

1. Using Data Loader, export the IDs of all individual accounts. For example, you can use this query: Select Id from Account where recordtype.name = '%Individual%

Note: If you have multiple record types that you want to retain, export accounts by record type and perform the following steps for each record type. Export only the IDs of these accounts to a CSV file.

2. In the exported CSV file, add a column and title it PersonRecordTypeId. Add the Person Account Record Type ID in this column for all records.
   a. From Setup, open Object Manager and click Person Account.
   b. Open Record Types and click the Person Account record type.
   c. In your browser address bar, copy the ID and paste it into the CSV file. Repeat for all records.

3. Using Data Loader, update the account records.
   Note: Use the update operation only. To prevent duplication, do not use the insert operation.
   a. Map Id to Id.
   b. Map PersonRecordTypeld to RecordTypeld.
   c. Update accounts using Data Loader. These individuals are now converted to person accounts.

After you have completed the transformation, validate that the records were converted.
1. Export all records to ensure that they have successfully converted to person accounts.
2. Open a converted record, and view all tabs (such as Relationships) to confirm that your data and relationships are unchanged.

Disable Person Accounts in Financial Services Cloud

You can choose either the individual object model or person accounts in Financial Services Cloud. If you choose the individual object model, follow these steps to disable person accounts.

Note: If you disable person accounts, you won’t be able to view or leverage person account data in Financial Services Cloud.

1. Remove Person Account record types from the Individual Record Type Mapper.
   a. From Setup, enter Custom Metadata in the Quick Find box, then select Custom Metadata.
   b. Click Manage next to the Individual Record Type Mapper.
   c. Click Delete next to Person Account.
      Note: Delete all custom Person Account record type mappings in the Individual Record Type Mapper.

2. Disable the Person Account custom setting.
   a. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
   b. In the list of custom settings, click Manage next to the Use Person Account custom settings.
   c. Click Edit next to Use Person Account.

EDITIONS

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
d. Click **Disable** and **Save**.

3. Assign the Individual record type to the System Administrator profile.
   a. From **Setup**, enter **Profiles** in the Quick Find box, and then select **Profiles**.
   b. Click **System Administrator**.
   c. In Record Type Settings, click **Edit** next to **Accounts**.
   d. Remove Person Account from the Selected Record Types list.
   e. Add Individual to the Selected Record Types list.
   f. Save your changes.
DEPLOY EINSTEIN BOTS FOR FINANCIAL SERVICES CLOUD

Einstein Bots for Financial Services Cloud help resolve top customer issues quickly, reducing call volume to save your company time and money.

Pre-Deployment Tasks for Einstein Bots for Financial Services Cloud
Complete the following tasks before deploying Einstein Bots for Financial Services Cloud.

Download and Deploy Einstein Bots for Financial Services Cloud
You can download and deploy the bot in two ways.

Post-Deployment Tasks for Einstein Bots for Financial Services Cloud
Configure the deployed package to get your bots up and running.

Considerations for Removing Einstein Bots for Financial Services Cloud
Before removing the Einstein Bots for Financial Services Cloud package, you must revoke the permission sets assigned to the bot. Also, you must undo the configuration that determines the name of the chat button in the landing page.

Pre-Deployment Tasks for Einstein Bots for Financial Services Cloud

1. **Enable Chat**
   Before you customize Chat, you must create the basic Chat implementation for your Salesforce org. After you complete the basic setup steps, you have a functioning Chat implementation that your agents can use to chat with customers.

   ![Note](image)
   If Chat is already enabled, you do not need to enable it again.

2. **Enable Einstein Bots**
   On the Einstein Bots setup page, enable bots, manage settings, and view and access your list of bots.

   ![Note](image)
   If Einstein Bots are already enabled, you do not need to enable them again.

Download and Deploy Einstein Bots for Financial Services Cloud

You can download and deploy the bot in two ways.

1. **Use a direct URL to the package.**
   To do this task, complete the instructions that follow in this topic.

2. **Download the package from AppExchange.**
   The URL for the AppExchange listing is https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FK9UYUA1. Follow the instructions in Installing a Package.

To download the bot package using a direct URL:

2. If you received a password from Salesforce, enter it.

3. Depending on your requirement, select either Install for Admin Profiles or Install. If the package installation fails, see Why did my installation or upgrade fail?

Verify the Deployment

Confirm that the deployment is successful in your org’s setup.

1. From Setup, enter Installed Packages in the Quick Find box, then select Installed Packages.

2. In the Installed Packages section, select Einstein Bots for Financial Services Cloud.

Post-Deployment Tasks for Einstein Bots for Financial Services Cloud

Configure the deployed package to get your bots up and running.

Set Up Test Data

Setting up test data involves:

- Setting up Chat
- Assigning permission sets to the bot
- Deploying test data to your Salesforce org

⚠️ Important: These steps deploy test data to your Salesforce org. We recommend that you perform this operation only in a test environment.

⚠️ Note: Before you begin, add your Salesforce org’s URL to your remote site setting.

To set up test data for the bots:

1. In your Salesforce org, click the App Launcher icon ( ⬅️) and select FSC Einstein Bots Manager.

2. On the Getting Started tab, in the Data Setup section, click Chat Setup, and follow the on-screen instructions.

3. In the Data Setup section, click Assign Bot PermSet, and follow the on-screen instructions.

4. In the Data Setup section, click Create FscBot Test Data, and follow the on-screen instructions.

Train Einstein Bots for Financial Services Cloud

The customer’s reason for interacting with your bot, such as reporting a lost card or registering an international travel plan, is called an intent. You associate an intent with a dialog. You then train the bot to create a learning model that your bot can use to understand the intents.

If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want. For example, a Report Lost Card dialog has an associated intent that trains the bot to understand the many ways that a customer could express the need to report a lost card.

1. From Setup, search for Einstein Bots in the Quick Find box, and click Einstein Bots.

2. In the My Bots section, select Einstein Bots for Financial Services Cloud.

3. From the Bot Builder menu in the top left, switch to the Overview page, and click Edit.

4. Click Build Model, and follow the on-screen instructions.
The bot training could take a while. In the meantime, you can complete the other steps. Your bot is trained when the Status field shows Succeeded and the Complete % shows 100%.

Set Up Org-Wide Email Addresses and Salesforce Sites

You can define and manage org-wide and no-reply addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the org-wide address for the email’s From address. Replies are delivered to the defined no-reply address. These configurations are required to send emails with verification codes to customers.

Salesforce Sites enables you to create public websites and apps that are directly integrated with your Salesforce org and don’t require users to log in with a username and password.

1. Create an org-wide email address and verify it.
2. From Setup, search for Custom Metadata Types in the Quick Find box, and click Custom Metadata Types.
3. Select FscBot_Settings, and click Manage Records.
4. Find BotOrgWideEmailAddress, and update its value with the org-wide email address that you created.
5. Find NoReplyEmailAddress, and update its value with the no-reply email address for your org. If you don’t have a no-reply email address, you can provide any valid email address.
6. If you don’t have a Salesforce site, register for one.
7. To test the bot, add the FSCBot_Landing Visualforce page to your site.

Configure the Chat Button

Give the chat button that is displayed on the landing page a name.

⚠️ Note: Perform these steps in Salesforce Classic.

1. From Setup, search for Chat Buttons & Invitations in the Quick Find box, and click Chat Buttons & Invitations.
2. Select FSC Chat Button, and click Edit.
3. In the Einstein Bots Settings section, set Einstein Bots Configuration to Einstein Bots for FSC.

Configure the Site Endpoint for Snap-Ins

Link your Salesforce site to a snap-in.

1. From Setup, search for Snap-ins in the Quick Find box, and click Snap-ins.
2. Click New Deployment
3. Give the snap-in deployment a name.
4. In the Site Endpoint dropdown list, select your Financial Services Cloud site.
5. Save your changes.
6. In the Chat Settings section, click Start.
7. In the Chat Deployment dropdown list, select Einstein Bots for Financial Services Cloud.
8. In the Chat Button dropdown list, select Chat Button for Einstein FSC Bots.
9. Save your changes.

Configure the Landing Page with a Snap-In

Configure the landing page to embed the bot snap-in.

1. From Setup, search for Snap-ins in the Quick Find box, and click Snap-ins.
2. Select the snap-in that you created, and click View.
3. Click Get Code.
4. Copy the chat code snippet.
5. From Setup, search for Visualforce Pages in the Quick Find box, and click Visualforce Pages.
6. Select the FscBot_Landing Visualforce page, and click Edit.
7. In the Visualforce Markup tab, paste the code snippet just before the closing body tag (</body>).
8. Save your changes.

Activate and Launch Einstein Bots for Financial Services Cloud

Activate the bot before you can start chatting with it from the landing page.

⚠️ **Important:** Before you begin, the bot training that you initiated must have completed successfully.

1. From Setup, search for Einstein Bots in the Quick Find box, and click Einstein Bots.
2. In the My Bots section, select Einstein Bots for Financial Services Cloud.
3. From the Bot Builder menu in the top left, switch to the Overview page.
4. Click Activate.
5. Go to <YOUR_SITE_URL>/FSCBot_Landing, and chat with your bot using snap-ins. <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

Considerations for Removing Einstein Bots for Financial Services Cloud

Before removing the Einstein Bots for Financial Services Cloud package, you must revoke the permission sets assigned to the bot. Also, you must undo the configuration that determines the name of the chat button in the landing page.

⚠️ **Important:** Be sure to complete the steps described in this topic before removing the bot package.

To remove the bot package, follow the instructions in Uninstalling a Package.

1. In your Salesforce org, click the App Launcher icon (.then) and select FSC Einstein Bots Manager.
2. On the Getting Started tab, in the Data Setup section, click Revoke PermSet Assignment, and follow the on-screen instructions.
3. In Salesforce Classic, from Setup, search for Chat Buttons and Automated Invitations in the Quick Find box, and click Chat Buttons and Automated Invitations.
4. Select Chat Button for Einstein FSC Bots, and click Edit.
5. In the Einstein Bots Settings section, clear the Einstein Bots Configuration field.
6. Save your changes.
TEST-DRIVE EINSTEIN BOTS FOR FINANCIAL SERVICES CLOUD

Launch the sample Einstein Bots through Embedded Service to see how chatbots can work for your customers. You can then use the sample data included to test the use cases of a reported lost card and registering an international travel plan.

Get Started
The test data to get started is located in the FSC Einstein Bots Manager.

Report a Lost Card
Use the provided test data to see how you can report a lost card to Einstein Bots for Financial Services Cloud. Block a card even if several cards are available for a customer. If an international travel plan has been registered, choose to have the replacement card delivered to the home address or one of the registered travel destinations.

Register an International Travel Plan
Use the provided test data to see how you can register an international travel plan with Einstein Bots for Financial Services Cloud.

Review Bot Activity
As an administrator, you can track and review all cases created by the bots in your Salesforce org.

Get Started
The test data to get started is located in the FSC Einstein Bots Manager.

Use the information provided in the following table to quickly test-drive the sample Einstein Bots.

<table>
<thead>
<tr>
<th>Item</th>
<th>Where to Find This Information</th>
</tr>
</thead>
</table>
| Last six digits of the card you want to report as lost or register a travel plan for | 1. In your Salesforce org, click the App Launcher icon ( ) and select FSC Einstein Bots Manager.  
2. On the Financial Accounts tab, use the last six digits of any listed account number. |
| Email address associated with the card | 1. Click the name of the primary owner of the card.  
The owner’s email address is listed on the Details tab.  
2. If you want the verification code emailed to you, change the email address to yours. |
Report a Lost Card

Use the provided test data to see how you can report a lost card to Einstein Bots for Financial Services Cloud. Block a card even if several cards are available for a customer. If an international travel plan has been registered, choose to have the replacement card delivered to the home address or one of the registered travel destinations.

1. Go to <YOUR_SITE_URL>/FSCBot_Landing.
   <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

2. In the chat window, select Report Lost Card.

3. For the card you want to report as lost, enter 875769 as the last six digits.
   In fact, you can use the last six digits of any card in the Financial Accounts tab in your Salesforce org. You accessed this information in Get Started on page 15.

4. Provide the email address associated with this card. You accessed this information in Get Started.

5. Provide the verification code you received by email.
   The verification code is sent to the primary owner’s email address.

6. Select the card you want to report as lost, and confirm your choice.

7. If you have a registered plan, confirm the destination address of the card.
   The bot creates a case for this lost card and provides you with a case number that you can use to follow up with a human agent later.

Register an International Travel Plan

Use the provided test data to see how you can register an international travel plan with Einstein Bots for Financial Services Cloud.

1. Go to <YOUR_SITE_URL>/FSCBot_Landing.
   <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

2. In the chat window, select Register Travel Plan.

3. For the card against which you want to register a travel plan, provide 875769 as the last six digits.
   In fact, you can use the last six digits of any card in the Financial Accounts tab in your Salesforce org. You accessed this information in Get Started on page 15.

4. Provide the email address associated with this card. You accessed this information in Get Started.

5. Provide the verification code you received by email.
   The verification code is sent to the primary owner’s email address.

6. Select the card for which you wish to register your travel plan.

7. Provide the name of the country you’re traveling to, with trip start and end dates.
   The bot creates a case for this travel plan registration and provides you with a case number that you can use to follow up with a human agent later.

Review Bot Activity

As an administrator, you can track and review all cases created by the bots in your Salesforce org.
1. In your Salesforce org, click the App Launcher icon ( ) and select **FSC Einstein Bots Manager**.

2. On the Cases tab, click **Recently Viewed**, and select **All Cases**.

3. Click the case number you want to review.

4. In the Case Information section, click the Live Chat Transcript record number to open it.

5. On the Details tab, you can review the chat in the Transcript section.
   
   You can also filter the list to view specific case types. Use the Lost Cards, Travel Plans, and Verification Codes tabs to review each case type.
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 clients. New custom objects let us model client financials, relationship groups, and more.

Data Model Overview
Learn about the objects and relationships within the Financial Services Cloud data model that represent a person along with their relationships and financial activities.

Tools for Getting Oriented to the Data Model
Review the objects that come with Financial Services Cloud using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.

How Is a Person Modeled?
Financial Services Cloud represents a person using one of two models: the individual or person account models. For some organizations, the person account model provides better support for business to consumer activities.

How Are Financial Accounts Modeled?
Custom objects are used to represent financial accounts and the parties involved with their financial accounts. In the individual model, these objects are related to the account object.

How Are Identification Documents, Other Assets, Liabilities, Goals, and Revenue Modeled?
Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the account object.

How Are Employment and Education Modeled?
Custom objects represent employment and education information. In the individual model, these objects are related to the contact object.

How Are Leads and Opportunities Modeled?
Standard objects record details about new customer leads and the opportunities to provide customers with new products.

What Is a Group?
A group gives insight into a customer’s financial circles, such as a household with its family members and professional connections. A group provides an overall view of its members by rolling up their information. You can extend a group with custom fields and more.

What Is a Relationship?
In addition to recording complex, multi-party relationships using groups, Financial Services Cloud also models one-to-one relationships between people and businesses. These relationships help you understand spheres of influence and spans of control.

Components That Visualize Groups and Relationships
Several components visualize groups and relationships in Lightning pages.

Control Who Sees What on the Relationship Map and Group Builder
Provide the right level of detail on the Relationship Map and Group Builder based on users’ roles, such as advisor, banker, or teller. Edit Lightning pages to show or hide Related Accounts and Related Contacts.
Data Model Overview

Learn about the objects and relationships within the Financial Services Cloud data model that represent a person along with their relationships and financial activities.

Tools for Getting Oriented to the Data Model

Review the objects that come with Financial Services Cloud using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.

From Setup, enter Schema Builder or API in Quick Find. Then select Schema Builder or API. To review objects with the Object Manager, select Object Manager from the top of the Setup page. You can also use a describe call from the API to see the complete list of fields for an object.

See the Metadata API Developer Guide Quick Start for information on obtaining the Enterprise WSDL files.

How Is a Person Modeled?

Financial Services Cloud represents a person using one of two models: the individual or person account models. For some organizations, the person account model provides better support for business to consumer activities.

The Individual Model
The individual model uses a combination of the standard Account and Contact objects, coupled in a unified object view of a person. The standard objects have been extended with custom fields, record types, and more.

The Person Account Model
The person account model uses the standard Account object to hold all of the details about a person. The Account object has been extended with custom fields, record types, and more.
The Individual Model

The individual model uses a combination of the standard Account and Contact objects, coupled in a unified object view of a person. The standard objects have been extended with custom fields, record types, and more.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Purpose</th>
<th>Record Types</th>
</tr>
</thead>
</table>
| Account    | Standard           | • Represents aspects of the person that pertain to dealings with your organization, such as review frequency or service tier  
• Related to opportunities, cases, and other Salesforce transactions | Individual   |
| Contact    | Standard           | • Represents aspects of the person that pertain to personhood regardless of the person’s relationship with your organization, 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 a person. Use the Institutional record type when a client is a business or an institution.

When you create an individual record, Salesforce creates an account record and a contact record. The account item then records the contact item ID in the Primary Contact field to record the relationship between the two records. In addition, an Individual ID is added to Account and Contact, which enables you to reference the person with a single ID.

Usually, with the unified object view, individual records 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 record is a duplicate account and contact. Keep this structure in mind as you help your users get accustomed to working in Financial Services Cloud.
Important: Make sure that no required fields are on the Contact object. To add required fields in the individual model, create the fields on the Account object.

The Person Account Model

The person account model uses the standard Account object to hold all of the details about a person. The Account object has been extended with custom fields, record types, and more.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Purpose</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Standard</td>
<td>• Represents all aspects of the person. Data includes personhood details, such as birth date or tax ID number, and dealings with your organization, such as review frequency or service tier • Related to opportunities, cases, and other Salesforce transactions as well as events, tasks, calls, and other Salesforce communications</td>
<td>Person account</td>
</tr>
</tbody>
</table>

Note: Use the Person account record type when a client is a person. Use the Institutional record type when a client is a business or an institution.

How Are Financial Accounts Modeled?

Custom objects are used to represent financial accounts and the parties involved with their financial accounts. In the individual model, these objects are related to the account object.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Account</td>
<td>Custom</td>
<td>A financial account, such as a brokerage account, bank account, or insurance policy.</td>
<td>• Auto Loan • Bank Account • Checking Account • Credit Card • General Account • HELOC • Investment Account • Insurance Policy • Loan Account</td>
</tr>
<tr>
<td>Object</td>
<td>Standard or Custom</td>
<td>Represents</td>
<td>Record Types</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Charges and Fees</td>
<td>Custom</td>
<td>The charges and fees taken for servicing a Financial Account. Record types differentiate between “line of credit” (Credit) and “deposit” (Debit) accounts.</td>
<td>• Credit</td>
</tr>
<tr>
<td>Financial Account Role</td>
<td>Custom</td>
<td>The role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.</td>
<td>• Account Role</td>
</tr>
<tr>
<td>Financial Account Transaction</td>
<td>Custom</td>
<td>The transactions that have taken place on a Financial Account.</td>
<td>• Contact Role</td>
</tr>
<tr>
<td>Billing Statement</td>
<td>Custom</td>
<td>Periodic summary of purchases, deposits, interest, fees, and charges against a Financial Account. Record types differentiate statement content and layouts between “line of credit” (Credit) and “deposit” (Debit) accounts.</td>
<td>• Credit</td>
</tr>
<tr>
<td>Card</td>
<td>Custom</td>
<td>The cards to access funds in a Financial Account.</td>
<td>• Debit</td>
</tr>
<tr>
<td>Financial Holding</td>
<td>Custom</td>
<td>A holding in an investment account, such as 10,000 shares of Salesforce (CRM).</td>
<td></td>
</tr>
<tr>
<td>Securities</td>
<td>Custom</td>
<td>An asset that is part of a financial holding, such as a stock.</td>
<td></td>
</tr>
</tbody>
</table>
How Are Identification Documents, Other Assets, Liabilities, Goals, and Revenue Modeled?

Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the account object.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets and Liabilities</td>
<td>Custom</td>
<td>Assets, such as real estate or collectibles, and liabilities, such as a mortgage, that are not otherwise represented in the financial account.</td>
<td>- Asset</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Liability</td>
</tr>
<tr>
<td>Financial Goal</td>
<td>Custom</td>
<td>A person’s financial goal, such as retirement or home purchase.</td>
<td></td>
</tr>
<tr>
<td>Identification Document</td>
<td>Custom</td>
<td>Details of documents used to verify the identity of a person.</td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>Custom</td>
<td>Revenue generated from operating a person’s financial account or by offering advisory services.</td>
<td></td>
</tr>
</tbody>
</table>

How Are Employment and Education Modeled?

Custom objects represent employment and education information. In the individual model, these objects are related to the contact object.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>Custom</td>
<td>Details of educational achievements.</td>
<td></td>
</tr>
<tr>
<td>Employment</td>
<td>Custom</td>
<td>Details of employment history.</td>
<td></td>
</tr>
</tbody>
</table>
How Are Leads and Opportunities Modeled?

Standard objects record details about new customer leads and the opportunities to provide customers with new products.

Using the Referral record type on the Lead object, users can create and automatically route referrals based on a customer's expressed interest.

Note: Many other standard Salesforce objects are used to provide the features of the Financial Services Cloud. You can explore the full Salesforce data model using schema builder or learn more from the Data Model section of the SOAP API Developer Guide.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>Standard</td>
<td>Details of leads provided by customers, employees, and associates.</td>
<td>• General</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Referral</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Retirement Planning</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Standard</td>
<td>Details of the opportunities to sell customers new products or services.</td>
<td>• General</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Opportunity (Wallet Share)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Retirement Planning</td>
</tr>
</tbody>
</table>

What Is a Group?

A group gives insight into a customer's financial circles, such as a household with its family members and professional connections. A group provides an overall view of its members by rolling up their information. You can extend a group with custom fields and more.

How Is a Group Modeled?

A group is a type of account record that people and businesses can be related to through the account contact relationship object. Financial Services Cloud includes a group record type for households. Use the household group to relate people to a household, household members to external contacts, and a household to external contacts and accounts.

You create groups by adding a record type to the account object and mapping it to the custom metadata type of Group Record Type. For more information, see Create and Configure Custom Record Types for Individuals and Groups.

What Is Group Membership?

The relationship between a group and a person or business is called group membership. Group membership defines the role of the member within the group. For example, Rachel Adams plays the role of a spouse in the Adams Household.

Group membership also defines whether:
• The member is the primary member of the group. The primary member is the person you contact first about things that affect the entire group.

• The group is the member’s primary group. This status defines which group the member’s information is rolled up in. Each person can only have one primary group, and the person’s information isn’t rolled up in any other group. You can also choose which information rolls up to the group. The options are any combination of:
  – Financial Accounts
  – Financial Goals
  – Events
  – Tasks
  – Assets and Liabilities
  – Referrals

How Is Group Membership Modeled?

Group membership is modeled using the Account Contact Relationship object. Groups can have client (direct) and business (indirect) members.

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct (individual member)</td>
<td>Account Contact Relationship</td>
<td>Standard</td>
<td>The membership of a person in a group (for example, a household).</td>
<td></td>
</tr>
<tr>
<td>Indirect (business member)</td>
<td>Account Contact Relationship</td>
<td>Standard</td>
<td>The membership of a business in a group, which occurs only when both these conditions are met:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• The business is related to a person in the group</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• The business’s Add to Group flag is set</td>
<td></td>
</tr>
</tbody>
</table>

Note: Account Contact Relationship is also used to hold details of one-to-one relationships between people and businesses.

SEE ALSO:
Configure Custom Record Types for Groups

What Is a Relationship?

In addition to recording complex, multi-party relationships using groups, Financial Services Cloud also models one-to-one relationships between people and businesses. These relationships help you understand spheres of influence and spans of control.
How Is a Relationship Modeled?

You can model relationships in various ways.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account-Account Relationship</td>
<td>Custom</td>
<td>The relationship between businesses, institutions, and groups.</td>
<td></td>
</tr>
<tr>
<td>Account Contact Relationship</td>
<td>Standard</td>
<td>The relationship between a person and a business or other account.</td>
<td></td>
</tr>
<tr>
<td>Contact-Contact Relationship</td>
<td>Custom</td>
<td>The relationship between two people.</td>
<td></td>
</tr>
<tr>
<td>Reciprocal Role</td>
<td>Custom</td>
<td>The nature of the relationship between a person and another person, business, or other account. For example, Proprietor and Owned Business. Used on the Account-Account Relationship and Contact-Contact Relationship objects.</td>
<td></td>
</tr>
</tbody>
</table>

Note: Account Contact Relationship is also used to hold details about the members of a group.

SEE ALSO:
- Create and Configure Custom Record Types for Individuals
- Configure Reciprocal Roles

Components That Visualize Groups and Relationships

Several components visualize groups and relationships in Lightning pages.

- Relationship Map and Group Builder—Build and visualizes memberships and relationships. Use at the person and group levels.
- Group Members (Configurable)—Displays members of a person’s primary group. Customize the member details displayed with account field sets. Use at the person and group levels.
- Group Members—Displays age, phone, mobile, email, and next and last interaction dates for members of a person’s primary group. Use at the person and group levels.
- Relationship Group List—Displays the person’s groups and group members as a related list. Use at the person level.
- Related Accounts—Displays the related accounts for a person or a group. Displays Account Contact relationships on a person’s page and Account-Account relationships on a group’s page.
- Related Contacts—Displays the related contacts for a person or a group.
Control Who Sees What on the Relationship Map and Group Builder

Provide the right level of detail on the Relationship Map and Group Builder based on users’ roles, such as advisor, banker, or teller. Edit Lightning pages to show or hide Related Accounts and Related Contacts.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Select Edit next to the Lightning page you want to modify, such as the Client Record Page. Or create a new page to assign to your users.
3. Select the Relationships tab and click Relationship Map. Or drag the Relationship Map component onto the page.
4. In the right panel, Show Related Accounts and Show Related Contacts are enabled by default. To hide Related Accounts or Related Contacts, deselect the appropriate checkbox.

5. Save your changes.
6. Optional: Activate the page for your users.

SEE ALSO:

Activate Lightning Experience Record Pages
DEPLOY EINSTEIN ANALYTICS FOR FINANCIAL SERVICES

Einstein Analytics for Financial Services gives financial advisors and personal bankers a comprehensive customer intelligence solution based on the Einstein Analytics platform. It includes Einstein Discovery, which lets you create automated artificial intelligence models on any dataset without writing code.

The Einstein Analytics for Financial Services suite provides a range of solutions, all of which enable the complete capabilities of Einstein Analytics. With advanced, curated visualizations that highlight key performance indicators (KPIs), advisors and personal bankers can stay on top of client goals and satisfaction, leads, and referrals. And managers can quickly review and evaluate individual and regional performance.

• Analytics for Wealth Management is a comprehensive analytics solution. Its extensive sets of dashboards apply the power of Einstein Analytics to all significant data and KPIs from the Financial Services Cloud. Unique collections of dashboards—one set for advisors/personal bankers, another for managers/executives—provide everyone on the team with insights they need to grow the business.

• Analytics for Insurance powers agents with practical insights on their sales performance and enables them to be more efficient in sales execution. App visualizations segment the customer base and provide insights on upsell/cross-sell opportunities so agents can grow their written premiums. Managers get insights on their team’s performance and what makes the top performers different so they can coach their team members.

• Analytics for Retail Banking gives retail bankers the insights they need with a role and business objective specific set of analytics dashboards. Branch managers and retail bankers get full visibility into customers, deposits, leads, referrals, and branch activity through the app’s dashboards.

• Consumer Banking Starter Analytics also gives you a quick start on your analytics journey. Its Retail Banking dashboard gives you insights into current customers, referrals, and opportunities to help personal bankers grow deposits.

• Wealth Starter Analytics gets you started fast with its My Book of Business dashboard. Advisors can use it to help deepen client relationships and increase assets under management (AUM).

To learn which one is right for you, see Use Financial Services Cloud Einstein Analytics Solutions.

Tip: Follow the steps in the order shown to deploy Einstein Analytics for Financial Services. If you haven’t used Salesforce Analytics before, learn about it from Analytics help.

Enable Analytics in Financial Services Cloud
Before creating Analytics for Financial Services or the Consumer Banking Starter Analytics or Wealth Starter Analytics apps, enable Analytics in your Salesforce org.

Assign Einstein Analytics for Financial Services Administrator Permissions
Enable administrators to create and manage Analytics for Financial Services by assigning the relevant permission sets.

Assign Analytics for Financial Services User Permissions
Enable users to view Analytics for Financial Services by assigning the relevant permission sets.

Get Your Data Ready to Create Einstein Analytics for Financial Services Apps
Data in your org has to meet specific requirements before you can create Analytics for Wealth Management, Analytics for Insurance, and Wealth Starter Analytics. Creating Consumer Banking Starter Analytics does not require any additional data settings.
Set Field-Level Security to Enable Creation of Einstein Analytics for Financial Services Apps
Before creating Analytics for Wealth Management, Analytics for Insurance, Consumer Banking Starter Analytics, or Wealth Starter Analytics, make sure the Analytics Integration User has access to all fields used in the app.

Create and Share Einstein Analytics for Financial Services Apps
Follow these steps to create and share the apps included in Einstein Analytics for Financial Services. These include Analytics for Wealth Management, Analytics for Retail Banking, Wealth Starter Analytics, or Consumer Banking Starter Analytics.

Embed Analytics for Financial Services Dashboards in Lightning Pages
Analytics for Financial Services includes dashboards intended for embedding and access in Lightning Experience pages.

Schedule the Dataflow for Einstein Analytics for Financial Services
When you create Analytics for Wealth Management, Consumer Banking Starter Analytics, or Wealth Starter Analytics, the creation process includes a dataflow that imports the latest data to Analytics. Schedule the dataflow to be rerun every day to ensure that your dashboards show the latest data.

Understand Einstein Analytics for Financial Services Limitations
Analytics for Financial Services provides access to Salesforce Einstein Analytics capabilities and features.

See Also:
Use Financial Services Cloud Einstein Analytics Solutions
Enable Analytics in Financial Services Cloud
Deploy Einstein Analytics for Financial Services

Enable Analytics in Financial Services Cloud
Before creating Analytics for Financial Services or the Consumer Banking Starter Analytics or Wealth Starter Analytics apps, enable Analytics in your Salesforce org.

1. **Note:** If you see a blue Launch Analytics button in the upper right corner, Analytics is already enabled and you can skip to “Assign Analytics for Financial Services App Administrator Permissions.”

2. From Setup, enter Getting Started in the Quick Find box, and then select Getting Started.
3. Click the green Enable Analytics button in the upper right corner.

Assign Einstein Analytics for Financial Services Administrator Permissions
Enable administrators to create and manage Analytics for Financial Services by assigning the relevant permission sets.

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Click the username with the System Administrator profile.
3. Click Permission Set Assignments, and then click Edit Assignments.
4. Select both the Einstein Analytics Platform Admin and FSC Analytics Admin permission sets.
5. Click Add, then click Save.
6. Repeat these steps for all users who need to create and manage Analytics for Financial Services.
Assign Analytics for Financial Services User Permissions

Enable users to view Analytics for Financial Services by assigning the relevant permission sets.

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Click the name of a user who requires access to Analytics for Financial Services, Wealth Starter Analytics, or Consumer Banking Starter Analytics.
3. Click Permission Set Assignments, and then click Edit Assignments.
4. Select both the Einstein Analytics Platform User and FSC Analytics User permission sets.
5. Click Add, then click Save.
6. Repeat these steps for all users who need to view Analytics for Financial Services.

Get Your Data Ready to Create Einstein Analytics for Financial Services Apps

Data in your org has to meet specific requirements before you can create Analytics for Wealth Management, Analytics for Insurance, and Wealth Starter Analytics. Creating Consumer Banking Starter Analytics does not require any additional data settings.

Analytics checks your org’s data to be sure it meets minimum requirements before creating an app from a template. If it doesn’t, you see a message describing what to fix. Here’s the data required in your org to be sure you can create an app from the template you want to use.

Analytics for Wealth Management Data Requirements

Your org must have at least one record in each of the following objects to create Einstein Analytics for Financial Services:

- Account
- Campaign
- Event
- FinancialAccount
- FinancialAccountTransaction
- FinancialGoal
- Lead
- LeadHistory
- Opportunity
- OpportunityHistory
- Task

In addition, for earnings and fees metrics to appear in relevant dashboards, you have to import data from an external source. See Import Earnings and Fees Data to Einstein Analytics for Financial Services Apps.

Analytics for Insurance Data Requirements

Your org must have at least one record in each of the following objects to create Analytics for Insurance:

- Insurance Policy
In addition, for earnings and fees metrics to appear in relevant dashboards, you have to import data from an external source. See Import Earnings and Fees Data to Einstein Analytics for Financial Services Apps.

Wealth Starter Analytics Data Requirements

To create an app from the Wealth Starter Analytics template, the User object in your org must include a custom field of type Text, with the following attributes:

- Field Label: FSC_WavePermissions
- Field Name: FSC_WavePermissions
- API name: FSC_WavePermissions__c

In addition, to access app datasets, set your org’s data security as follows:

1. Make sure that you own the records you want to access records. For example, for data in the Campaign Member dataset, you need to own a campaign to see its campaign members.

2. Set the value of the User object FSC_WavePermissions__c field to View All. Be sure to capitalize View All. Log out of Einstein Analytics and log back in to enable the setting.

Import Earnings and Fees Data to Einstein Analytics for Financial Services Apps

Follow these steps to add data about earnings and fees from an external source to the Analytics for Wealth Management and Analytics for Insurance apps.

Analytics for Wealth Management Example .CSV File

Here’s an example of the .CSV file you create to update the Analytics for Wealth Management earnings and fees dataset.

Import Earnings and Fees Data to Einstein Analytics for Financial Services Apps

Follow these steps to add data about earnings and fees from an external source to the Analytics for Wealth Management and Analytics for Insurance apps.

1. Create a .CSV file with the following columns (field names), in this order, with these exact names. Column names are case-sensitive:

<table>
<thead>
<tr>
<th>Name</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>product</td>
<td>Names of your financial products, such as Annuity, ETF, and Mutual Fund.</td>
</tr>
<tr>
<td>id</td>
<td>A number that’s used to identify the fee/earning record.</td>
</tr>
</tbody>
</table>
For an example, see Analytics for Wealth Management Example .CSV File.

Important: Create and open .CSV files using only a UTF-8-compliant text editor. Opening them in Microsoft Excel or other spreadsheet software reformats .CSV files and makes them unusable in Analytics.

2. Save the .CSV file to a location you can easily remember.

3. Create the app according to the instructions provided in Create and Share Einstein Analytics for Financial Services Apps.

4. Open the app, click Datasets, and locate the earnings and fees dataset.

5. Click the triangle on the far-right side of the screen, and select Edit.

6. At the top of the next screen, locate the Replace Data icon, next to the gear, and click it.

7. Click Select a file or drag it here, locate the .CSV file you created, select it, and click Open.

8. On the next two screens, click Next. Then, click Upload File and Replace.

The next time the dataflow for your app runs, Analytics adds fees and earnings metrics to relevant dashboards.

### Analytics for Wealth Management Example .CSV File

Here's an example of the .CSV file you create to update the Analytics for Wealth Management earnings and fees dataset.

<table>
<thead>
<tr>
<th>product</th>
<th>id</th>
<th>date</th>
<th>fees</th>
<th>revenue</th>
<th>commissions</th>
<th>aum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annuity</td>
<td>1</td>
<td>2018-04-08</td>
<td>471.47</td>
<td>1266.59</td>
<td>142.1</td>
<td>688051.4</td>
</tr>
<tr>
<td>Annuity</td>
<td>2</td>
<td>2018-04-03</td>
<td>333.22</td>
<td>1779.32</td>
<td>634.29</td>
<td>1101404.38</td>
</tr>
<tr>
<td>ETF</td>
<td>3</td>
<td>2018-04-29</td>
<td>419.49</td>
<td>766.86</td>
<td>113.81</td>
<td>1150628.79</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>4</td>
<td>2018-04-26</td>
<td>498.2</td>
<td>822.17</td>
<td>927.73</td>
<td>462348.11</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>5</td>
<td>2018-02-17</td>
<td>450.12</td>
<td>1454.37</td>
<td>63.2</td>
<td>1110180.51</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>6</td>
<td>2018-06-10</td>
<td>664.98</td>
<td>1908.04</td>
<td>659.39</td>
<td>1157066.6</td>
</tr>
<tr>
<td>Annuity</td>
<td>7</td>
<td>2018-04-29</td>
<td>667.34</td>
<td>1150628.79</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Insurance</td>
<td>8</td>
<td>2018-03-09</td>
<td>556.04</td>
<td>1052.64</td>
<td>922.76</td>
<td>919275.15</td>
</tr>
<tr>
<td>ETF</td>
<td>9</td>
<td>2018-06-27</td>
<td>170.19</td>
<td>1878.01</td>
<td>751.38</td>
<td>1140515.99</td>
</tr>
<tr>
<td>Mutual Fund</td>
<td>10</td>
<td>2018-02-23</td>
<td>1203.79</td>
<td>0</td>
<td>922238.4</td>
<td></td>
</tr>
<tr>
<td>Life Insurance</td>
<td>11</td>
<td>2018-01-18</td>
<td>268.01</td>
<td>556.91</td>
<td>392.37</td>
<td>841724.49</td>
</tr>
<tr>
<td>Mutual Fund</td>
<td>12</td>
<td>2018-02-04</td>
<td>689.72</td>
<td>1604.4</td>
<td>708.29</td>
<td>1094500.71</td>
</tr>
<tr>
<td>ETF</td>
<td>13</td>
<td>2018-02-09</td>
<td>282.24</td>
<td>1565.3</td>
<td>13.46</td>
<td>491790.29</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>14</td>
<td>2018-07-12</td>
<td>755.09</td>
<td>809.98</td>
<td>992</td>
<td>598137.15</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>15</td>
<td>2018-07-28</td>
<td>503.85</td>
<td>1178.26</td>
<td>177.14</td>
<td>573037.08</td>
</tr>
<tr>
<td>Annuity</td>
<td>16</td>
<td>2018-01-03</td>
<td>269.3</td>
<td>816.47</td>
<td>684.57</td>
<td>595944.41</td>
</tr>
</tbody>
</table>
### Set Field-Level Security to Enable Creation of Einstein Analytics for Financial Services Apps

Before creating Analytics for Wealth Management, Analytics for Insurance, Consumer Banking Starter Analytics, or Wealth Starter Analytics, make sure the Analytics Integration User has access to all fields used in the app.

If users don’t have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here’s how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

Follow these steps in Lightning Experience.

1. In Setup, enter `object` in the Quick Find box, and click **Enter**.
2. Select **Object Manager**.
3. Enter the name of the object whose field-level security you need to edit in the Quick Find box, and click **Enter**.
4. Select the object you need to edit, then select **Fields & Relationships**.
5. Select the field you need to edit, then select **Set Field-Level Security**.
6. Look for the Analytics Cloud Integration User, check the boxes for the required fields under Visible, and click **Save**.
7. Repeat steps 5 and 6 for all fields you want to use.
8. Refresh your browser cache.

Follow these steps in Salesforce Classic.

1. In Setup, enter the name of the object whose field-level security you need to edit in the Quick Find box and click **Enter**.
2. Click the name of the object.
3. The next window shows all the fields for the object. Go to the one(s) where you need to edit field-level security.
4. Look for the Analytics Cloud Integration User, check the boxes for the required fields under Visible, and click **Save**.
5. Repeat steps 2 through 5 for all objects with fields you want to use. Refresh your browser cache.

---

### Create and Share Einstein Analytics for Financial Services Apps

Follow these steps to create and share the apps included in Einstein Analytics for Financial Services. These include Analytics for Wealth Management, Analytics for Retail Banking, Wealth Starter Analytics, or Consumer Banking Starter Analytics.

1. Navigate to Analytics Studio.
2. Click Create, then select App.

3. Select the template for the app you want to create:
   - Analytics for Wealth Management
   - Analytics for Insurance. To create and share this app, see
   - Analytics for Retail Banking
   - Wealth Starter Analytics
   - Consumer Banking Starter Analytics

   Then click Continue.

   Note: Analytics for Wealth Management was called Einstein Analytics for Financial Services until the Winter '20 Salesforce release.

4. Have a quick look at the template preview page, then click Continue.

5. Analytics performs a compatibility check of your org’s data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click Looks good, next.

   Important: The Consumer Banking Starter Analytics template includes a wizard with a single question. It asks if you’d like to enable Salesforce data security settings so app users can view only records they own. It’s recommended that you leave the default answer — No — so that all users can view all records. If you’d prefer to limit users to viewing only the data from records they own, select Yes.

6. Name your app and click Create.

7. View the status of app creation on the next page. The process takes a minute or two. Once it’s complete, refresh the page to see your app.

   Note: You may see an error saying the Analytics Integration User does not have access to selected fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you’ve created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Financial Services. To share the app, go to the top-level Analytics Studio page, roll your cursor over the icon for the app, and click Share. Next, type in the names of team members, click Add, and save your changes.

Create and Share the Analytics for Insurance App

Follow these steps to create and share an app from the Analytics for Insurance template.

1. Navigate to Analytics Studio.

2. Click Create, then select App.

3. Select Analytics for Insurance. Then click Continue.

4. Have a quick look at the template preview page, then click Looks good, next to open the configuration wizard.

5. If you’ve already created an app, the wizard asks if you want to create a new app or reuse answers from an existing app. Make your selection, and click Continue.

6. Analytics performs a compatibility check of your org’s data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click Looks good, next.
7. The next page of the wizard asks you to make two selections. After you’re done, click **Looks good, next**.
   a. The first wizard question asks how you’d like Analytics to store data in app datasets. You have two options, **Snapshot** and **Incremental**. Select **Snapshot** to capture all data from the Insurance Policy object once per week. The snapshot option results in better performance but consumes more data storage space. It also shows data starting from the weekly snapshot date and not from policy effective dates. Select **Incremental** to capture only changes made to the Insurance Policy object. The incremental option results in optimal use of data storage space, and dashboards show data starting from the policy effective date. However, overall performance may be slower.
   b. Next, the wizard asks if you’d like to apply security predicates to data. If you choose **Yes**, only a record’s owner or by someone in a role with permission to view the record can view the data. If you answer **No**, everyone viewing app dashboards can see all data.

8. Name your app and click **Create**.
9. View the status of app creation on the next page. The process takes a minute or two. Once it’s complete, refresh the page to see your app.

**Note:** You may see an error saying the Analytics Integration User does not have access to selected fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you’ve created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Financial Services. To share the app, go to the top-level Analytics Studio page, roll your cursor over the icon for the app, and click **Share**. Next, type in the names of team members, click **Add**, and save your changes.

### Embed Analytics for Financial Services Dashboards in Lightning Pages

Analytics for Financial Services includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see Embed Analytics Dashboards in Lightning Pages in Salesforce Help. Here are examples using dashboards from the Analytics for Wealth Management app, including the code for the filter attribute set in Step 4 of Embed Analytics Dashboards in Lightning Pages.

**Financial Advisor Home.** Intended for access through your Financial Services Cloud home page, but can be embedded anywhere you want to show data insights.

**Financial Account.** Embed in a financial accounts record page. Set the Filter attribute with the following:

```json
{'datasets': {'FSC_FinancialAccount': [{'fields': ['Id'], 'filter': {'operator': 'in', 'values': ['$Id']})]}}
```

**Goal.** Embed in a financial goals record page. Set the Filter attribute with the following:

```json
{'datasets': {'FSC_FinancialGoal': [{'fields': ['Id'], 'filter': {'operator': 'in', 'values': ['$Id']})]}}
```

**Lead & Referral.** Embed in a lead or referral record page. Set the Filter attribute with the following:

```json
{'datasets': {'FSC_FinancialGoal': [{'fields': ['Id'], 'filter': {'operator': 'in', 'values': ['$Id']})]}}
```
Opportunity. Embed in a product record page. Set the Filter attribute with the following:

```json
{‘datasets’:{‘FSC_Opportunity’:[{‘fields’:[‘Id’], ‘filter’:{‘operator’: ‘in’, ‘values’:[‘$Id’]}}]}}
```

Schedule the Dataflow for Einstein Analytics for Financial Services

When you create Analytics for Wealth Management, Consumer Banking Starter Analytics, or Wealth Starter Analytics, the creation process includes a dataflow that imports the latest data to Analytics. Schedule the dataflow to be rerun every day to ensure that your dashboards show the latest data.

1. In Analytics Studio, click the wheel icon at upper right and select **Data Manager**.
2. Select **Dataflows**.
3. Look for the name you gave your app when you created it, and click the triangle to the far right.
4. Select **Schedule**, and set a time for updating data in your app. Select a time outside normal work hours so the dataflow doesn’t interrupt business activities.
5. Click **Save**.

Understand Einstein Analytics for Financial Services Limitations

Analytics for Financial Services provides access to Salesforce Einstein Analytics capabilities and features. Einstein Analytics for Financial Services gives you the same access to Einstein Analytics capabilities as the Einstein Analytics Growth and Plus licenses. Consult this chart to see any limitations.

<table>
<thead>
<tr>
<th>Capability</th>
<th>Einstein Analytics Growth or Plus; Einstein Analytics for Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data sources</td>
<td>Salesforce and external data</td>
</tr>
<tr>
<td>Object support</td>
<td>Standard and custom objects</td>
</tr>
<tr>
<td>Data volume</td>
<td>1 billion rows to start</td>
</tr>
<tr>
<td>Can customize existing dashboards?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can create dashboards?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can customize existing datasets?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can create datasets?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can create custom Analytics apps?</td>
<td>Yes</td>
</tr>
<tr>
<td>Capability</td>
<td>Einstein Analytics Growth or Plus; Einstein Analytics for Financial Services</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supports Einstein Discovery and Community Cloud integration?</td>
<td>Yes</td>
</tr>
<tr>
<td>Supports bulk actions and APEX steps?</td>
<td>Yes</td>
</tr>
<tr>
<td>Supports Sales Cloud Einstein artificial intelligence?</td>
<td>No</td>
</tr>
<tr>
<td>Supports Salesforce Inbox?</td>
<td>No</td>
</tr>
</tbody>
</table>
CUSTOMIZE YOUR IMPLEMENTATION

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

**Create Users**
Create users for Financial Services Cloud and assign the required permissions using profiles and permission sets.

**Create User Profiles for Other User Personas**
Create profiles to define the permissions and field-level security settings for other users in your organization.

**Assign the Teller Access Permission Set (Optional)**
Create a teller user profile and a teller user before assigning the Teller Access permission set.

**Assign Financial Services Cloud Permission Set Licenses**
Use permission set licenses to give your users access to Financial Services Cloud.

**Set Up a Mobile Home Page**
Boost users’ productivity on the go by setting up a Financial Services Cloud home page for the Salesforce app.

**Modify the Mobile Navigation Menu**
Let users access Financial Services Cloud through the mobile navigation menu.

**Add Actions to Custom Object Page Layouts**
Enable clone, delete, and edit actions for Financial Services Cloud custom objects so that users can access them on record detail pages in Lightning Experience.

**Add Quick Actions in Client Segmentation Analytics App**
Quick actions let users take advantage of Salesforce actions from client details in Client Segmentation Analytics.

**Embed Client Segmentation Analytics Dashboards in Financial Services Cloud**
After you create and share the Client Segmentation Analytics app, users can access its dashboards through Analytics Studio. To make the dashboards available in Financial Services Cloud, create a tab and embed the dashboards in the tab.

**Customize Roles for Individuals**
Customize the roles that individuals play as members of a group.

**Show Detailed Error Messages**
 Expedite debugging for you and your users with detailed error messages that provide insight into field-level security restrictions.

**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 and Configure Custom Record Types for Individuals and Groups**
If your users have individuals or relationship groups that don’t fit the default record type, you can create and configure a custom record type based on the default individual or group record type.

**Financial Services Cloud Alerts**
Financial Services Cloud provides a framework for alerts so that users can get timely alerts about clients and act as necessary.
Customize Your Implementation

**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.

**Group Member Details Setup**

You can set up the Group Members (Configurable) Lightning component so that users can see configured member data from one page.

**Reorder Account and Contact Information**

Arrange the order of the account and contact information to suit your users’ needs. From Lightning App Builder, show contact details at the top of the client record page and account information at the bottom, or vice versa. You can also rearrange Account and Contact Related Lists on the Related tab.

**Reorder an Individual’s First Name and Last Name**

You can change the order in which individuals’ first name and last name appear on the details page.

**Set Up a New Lightning Page for Contact Records**

When you create an org default 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.

**Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans**

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

**Enable Insurance for Financial Services Cloud**

Insurance for Financial Services Cloud includes a new data model for insurance, new Lightning components, and a tailored Lightning console app: Insurance Agent Console. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals. When you add the Policy and Life Events or Business Milestones components to the account record page, agents have a consolidated view of their customers’ life events or business milestones, insurance policies, claims, and other related details. Use the Insurance Agent Portal template to create a portal that gives independent insurance agents access to the insurance features and components and lets them manage and grow their books of business.

**Enable Retail Banking Features**

Get a 360-degree view of customers with Retail Banking, a Financial Services Cloud Lightning app. Bankers can also easily manage high-volume transactions on one screen with the Retail Banking Console. The information bankers need is supported with new objects, fields, and record types for loans, deposits, and more.

**Enable Commercial Banking Features**

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

**Rollups in Financial Services Cloud**

Financial Services Cloud supports rollup by lookup (RBL) summary rules and record rollups at the client and group levels. An RBL rule displays summary calculations of financial account information, such as account balances. A record rollup displays associated records for Financial Accounts, Financial Goals, Assets & Liabilities, Events, Tasks, Referrals, Insurance Policies, Claims, and Opportunities.

**Set Up Intelligent Need-Based Referrals and Scoring**

Intelligent Need-Based Referrals and Scoring is a referral management workflow that helps source referrals internally and externally across lines of business. Users create and automatically route referrals based on a customer’s expressed interest, from savings accounts to home loans. Build processes to create automatic email notifications that keep users up-to-date. The dashboards and reports make it a snap to identify and reward top referrers.
Enable the Insurance Console (Optional)
The Insurance Console, with custom fields for policy term and total premium, provides a customized view of insurance policyholders.

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

Synchronize the Next and Last Interactions on the Account Object
Schedule an Apex job to set up a batch job for next and last interaction calculations.

Surveys in Financial Services Cloud
Get customer feedback fast with Salesforce Surveys in Financial Services Cloud. Use a simple editor to create forms for collecting customer data. You can add various question types, including a customer satisfaction score, to gather useful insights from your users and customers. Summarize and share customer feedback in reports and dashboards.

Financial Services Cloud Communities
Empower partners and customers by providing access to Financial Services Cloud through Communities licenses for external users. Financial Services Cloud lets you give access to a client's profile, including account details, financial accounts, and more, with Community Cloud. An advisor, client, or customer can access client account information in a community.

Create Users
Create users for Financial Services Cloud and assign the required permissions using profiles and permission sets.

1. From Setup, enter Users in Quick Find, then select Users.
2. Create a user. Assign it the Salesforce user license.
3. Based on the persona of the user, assign a profile, such as System Administrator, Advisor, Personal Banker, or a custom profile. (See Create User Profiles for Other User Personas to create a custom profile.)
4. Save your changes.
5. Click Permission Set Assignments and then click Edit Assignments.
6. From Available Permission Sets, add the relevant permission sets to Enabled Permission Sets as shown below.

<table>
<thead>
<tr>
<th>User Persona</th>
<th>Permission Sets to Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Financial Services Cloud Standard, Advisor Access, and Personal Banker Access</td>
</tr>
<tr>
<td>Advisor</td>
<td>Financial Services Cloud Standard and Advisor Access</td>
</tr>
<tr>
<td>Personal Banker</td>
<td>Financial Services Cloud Standard and Personal Banker Access</td>
</tr>
<tr>
<td>Teller</td>
<td>Financial Services Cloud Basic and Teller Access</td>
</tr>
</tbody>
</table>

Note: You may assign custom permission sets as desired to provide additional access, as required by the user’s persona. For example, customize Advisor profile permissions to allow advisors to delete financial account role (FAR) records.

7. Save your changes.
8. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign Einstein Analytics Client Segmentation app access permissions to Admin user.
a. From Setup, enter Users in the Quick Find box, and then select Users.
b. Click the user name with the System Administrator profile.
c. Click Permission Set Assignments, and then click Edit Assignments.
d. Select the Client Segmentation Admin permission set.
e. Click Add, then click Save.

9. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign Einstein Analytics Client Segmentation app access permissions to other users in your organization.
a. From Setup, enter Users in the Quick Find box, and then select Users.
b. Click the name of a user who requires access to the Client Segmentation Analytics app.
c. Click Permission Set Assignments, and then click Edit Assignments.
d. Select the Client Segmentation User permission set.
e. Click Add, then click Save.
f. Repeat these steps for all users who require access to the Client Segmentation Analytics app.

Create User Profiles for Other User Personas

Create profiles to define the permissions and field-level security settings for other users in your organization.

Start by cloning the Standard User profile.
1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Clone the Standard User profile.
3. Give the profile a name to identify the type of user, such as Teller or Client Associate.
4. Save your changes.
5. Click Edit to update the permissions and field-level security as needed.
6. Save your changes.
   You can now create new users based on this profile.

Assign the Teller Access Permission Set (Optional)

Create a teller user profile and a teller user before assigning the Teller Access permission set.
1. From Setup, enter Profiles in the Quick Find box, and then select Profiles.
2. Click New and clone the Standard User profile.
3. Give the profile a name, such as Teller.
4. Save your changes.
5. From Setup, enter Users in the Quick Find box, and then select Users.
6. Click New to create a new user.
7. Enter a name, such as Teller, and assign the Teller profile.
8. Save your changes.
9. From the Permission Set Assignment related list, click Add.
11. Save your changes.

Here’s an overview of the Teller Access permission set.

<table>
<thead>
<tr>
<th>Objects</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Read, Update</td>
</tr>
<tr>
<td>Activities, Tasks</td>
<td>Create, Read, Update, Delete</td>
</tr>
<tr>
<td>Alerts</td>
<td>Read, Update</td>
</tr>
<tr>
<td>Calendar, Events</td>
<td>Create, Read, Update, Delete</td>
</tr>
<tr>
<td>Cases</td>
<td>Create, Read</td>
</tr>
<tr>
<td>Contacts</td>
<td>Read, Update</td>
</tr>
<tr>
<td>Content</td>
<td>Create, Read, Update, Delete</td>
</tr>
<tr>
<td>Documents</td>
<td>Create, Read, Update, Delete</td>
</tr>
<tr>
<td>Employee cases</td>
<td>Create, Read, Update, Delete</td>
</tr>
<tr>
<td>Leads</td>
<td>Create, Read, Update</td>
</tr>
</tbody>
</table>

Note: The Teller Access permission set provides read-only access to Salesforce standard objects and Financial Services Cloud custom objects not listed in this table.

Assign Financial Services Cloud Permission Set Licenses

Use permission set licenses to give your users access to Financial Services Cloud.

<table>
<thead>
<tr>
<th>Permission Set License</th>
<th>User Permissions</th>
<th>Object Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Enables access to Lightning components and the standard version of Financial Services Cloud.</td>
<td>Provides access to the standard Salesforce objects and custom objects.</td>
</tr>
<tr>
<td>Basic</td>
<td>Financial Services Cloud Basic is a Financial Services Cloud Standard license with contractual restrictions.</td>
<td></td>
</tr>
</tbody>
</table>

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click a user’s name.
3. Under Permission Set Assignments, click Edit Assignments.
4. Depending on the license that has been provisioned in your org, you’ll see Financial Services Cloud Standard or Financial Services Cloud Basic. Choose the permission set available in your org.
5. Save your changes.

SEE ALSO:
Tip Sheet: Manage Bulk Permission Set License (PSL) Assignments for Financial Services Cloud

Set Up a Mobile Home Page

Boost users’ productivity on the go by setting up a Financial Services Cloud home page for the Salesforce app.

Note: Salesforce is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Click New.
4. Enter a label, such as Mobile Home.
5. Select the One Column layout and click Finish.
6. Drag components into the template to customize your mobile home page. Choose from standard and custom Financial Services Cloud components.
7. (Optional) To preview the mobile home page, click Desktop and then select Phone from the drop-down menu.
8. Save your changes.

Note: To activate mobile home pages as part of your mobile navigation, see Modify the Mobile Navigation Menu.

Modify the Mobile Navigation Menu

Let users access Financial Services Cloud through the mobile navigation menu.

Note: Leverage person accounts to make the most of Financial Services Cloud on a mobile browser.

1. From Setup, enter Mobile in the Quick Find box, then select Salesforce Mobile Quick Start.
2. Click Launch Quick Start Wizard.
3. Click Let’s Get Started.
4. Drag items from Available Items to the Navigation Menu.
   Here’s a recommended sequence:
   • Mobile Home
     Note: See Set Up a Mobile Home Page to configure your mobile home page.
   • Today
   • Chatter
   • Tasks
   • Events
   • Dashboards
Customize Your Implementation

- Reports
- People
- Groups
- Smart Search Items

Note: In Smart Search Items, users see recently viewed Salesforce objects. Here’s a recommended sequence:

- Accounts
- Contacts
- Financial Accounts
- Financial Goals
- Financial Holdings
- Assets and Liabilities
- Leads
- Opportunities

5. Click Save & Next.
6. Click Arrange Global Actions.
7. From the Layout dropdown, select Advisor Publisher Layout

Note: If you don’t see the Advisor Publisher Layout in the dropdown, configure your own publisher layout. For details, see Add Global Actions to Publisher Layouts.

8. Click Save & Next.
9. Click Create Compact Layout.
10. In the Compact Layout for Contacts, add the following fields: Name, Account Name, Phone, and Email.
11. Click Save & Next.
12. Review your configuration and click Next.
13. (Optional) Send invitations.

SEE ALSO:
What’s Different or Not Available in the Salesforce App

Add Actions to Custom Object Page Layouts

Enable clone, delete, and edit actions for Financial Services Cloud custom objects so that users 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 Mobile & Lightning Actions category in the palette, and then drag these actions to the Salesforce Mobile and Lightning Experience Actions section.

EDITIONS

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
Add Quick Actions in Client Segmentation Analytics App

Quick actions let users take advantage of Salesforce actions from client details in Client Segmentation Analytics.

1. From Setup, open Object Manager and click Account.
2. Open Page Layouts and click Account (Individual) Layout.
3. 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.

4. In the palette, select the Quick Actions category and then drag each quick action to the Quick Actions in the Salesforce Classic Publisher section and the Salesforce Mobile and Lightning Experience Actions section.

5. Save your changes.

Embed Client Segmentation Analytics Dashboards in Financial Services Cloud

After you create and share the Client Segmentation Analytics app, users can access its dashboards through Analytics Studio. To make the dashboards available in Financial Services Cloud, create a tab and embed the dashboards in the tab.

1. Create a Visualforce page where you embed Client Segmentation dashboards.
2. Embed dashboards in your page.
3. Add your page to a Visualforce tab.

SEE ALSO:
- Create Visualforce Pages
- Add an Analytics Dashboard to a Visualforce Page
- Create Visualforce Tabs

Customize Roles for Individuals

Customize the roles that individuals play as members of a group.

1. From Setup in Object Manager open Account Contact Relationships and then Fields & Relationships.
2. Select Roles.
3. Add or delete roles as needed.
4. Save your changes.

Show Detailed Error Messages

Expedite debugging for you and your users with detailed error messages that provide insight into field-level security restrictions. A detailed error message includes information about the access type, fields, and object.

1. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
2. Click Industries Application Config.
3. Click Manage and then click Edit.
4. Select Show Detailed Error Messages.
5. 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.

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 tabs.

2. In the View drop-down list, select All, and then select Go to view the reciprocal roles. The roles provided are:

<table>
<thead>
<tr>
<th>Role</th>
<th>Inverse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountant</td>
<td>Client</td>
</tr>
<tr>
<td>Role</td>
<td>Inverse</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Lawyer</td>
<td>Client</td>
</tr>
<tr>
<td>Parent</td>
<td>Dependent</td>
</tr>
<tr>
<td>Dependent</td>
<td>Parent</td>
</tr>
<tr>
<td>Ex-Spouse</td>
<td>Ex-Spouse</td>
</tr>
<tr>
<td>Grandparent</td>
<td>Grandchild</td>
</tr>
<tr>
<td>Grandchild</td>
<td>Grandparent</td>
</tr>
<tr>
<td>Power of Attorney</td>
<td>Client</td>
</tr>
<tr>
<td>Extended Family</td>
<td>Extended Family</td>
</tr>
<tr>
<td>Business</td>
<td>Proprietor</td>
</tr>
<tr>
<td>Sibling</td>
<td>Sibling</td>
</tr>
<tr>
<td>Spouse</td>
<td>Spouse</td>
</tr>
</tbody>
</table>

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 roles are available only in English. To translate them into another language, delete the role records and create your own records.

SEE ALSO:
- What Is a Relationship?

## 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.

This override replaces the value of Company Name with the lead’s full name when saving a B2C lead. If the override is disabled, a B2C lead cannot be saved until the lead’s full name is entered in the Company Name field. By default, the override is enabled for System Administrator, Advisor, and Personal Banker profiles.

   - **Note**: This setting is only applicable to orgs using the individual object model, it has no effect in orgs where the person account model is in use.

1. From Setup, enter *Custom Settings* in Quick Find, then select **Custom Settings**.
2. Select **B2C Lead Company Name Config** and click **Manage**.
3. Next to the profile to amend, click **Edit**.
4. To turn off the override, clear **Override Company Name**.

If you want to apply this custom setting to other profiles or users, add them and select Override Company Name.
Create and Configure Custom Record Types for Individuals and Groups

If your users have individuals or relationship groups that don’t fit the default record type, you can create and configure a custom record type based on the default individual or group record type.

Create and Configure Custom Record Types for Individuals
First create custom record types on account and contact based on the individual record types. Configure the record type mapping for the custom individual record type, then assign the record types to the user profiles that will use them.

Configure Custom Record Types for Groups
First create custom record types on account, based on the household record type. Configure the record type mapping for the custom group record types, then assign the record types to the user profiles that will use them.

SEE ALSO:
Create Record Types

Create and Configure Custom Record Types for Individuals

First create custom record types on account and contact based on the individual record types. Configure the record type mapping for the custom individual record type, then assign the record types to the user profiles that will use them.

1. From Setup open Object Manager and locate Account.
2. Open Record Types and click New.
3. Under Existing Record Type select Individual, give your new record type a label, add a description and set it as active.
4. Save your changes.
5. Following the same steps, create a new record type on Contact.
6. From Setup, enter metadata in Quick Find, then select Custom Metadata Types.
7. Click Individual Record Type Mapper and Manage Individual Record Type Mappers.
8. Click New.
9. Complete the following information for the record type mapper:
   a. Enter a label.
   b. Don’t change the automatically set name.
   c. Enter the name of the Account Record Type you added in step 3.
   d. Enter the account record type’s namespace.
   e. Enter the name of the Contact Record Type you added in step 5.
   f. Enter the contact record type’s namespace.
10. Save your changes.
Follow the instructions in Assign Record Types and Page Layouts in the Enhanced Profile User Interface to assign the new record types to the Personal Banker and Advisor profiles. When advisors and personal bankers create an account or contact, this custom record type is available to use.

SEE ALSO:
What Is a Relationship?
Assign Record Types and Page Layouts in the Enhanced Profile User Interface

Configure Custom Record Types for Groups

First create custom record types on account, based on the household record type. Configure the record type mapping for the custom group record types, then assign the record types to the user profiles that will use them.

1. From Setup open **Object Manager** and locate **Account**.
2. Open **Record Types** and click **New**.
3. Under Existing Record Type select **Household**, give your new record type a label, add a description and set it as active.
4. Save your changes.
5. From Setup, enter *metadata* in Quick Find, then select **Custom Metadata Types**.
6. Click **Group Record Type Mapper**, and then **Manage Group Record Type Mappers**.
7. Click **New**.
8. Complete the following information for the record type mapper.
   a. Enter the label of the record type created in step 3.
   b. Don’t change the automatically set label.
   c. Enter Account Type as *Account record type name*.
   d. Enter the record type’s namespace.
9. Save your changes.
10. Follow the instructions in Assign Record Types and Page Layouts in the Enhanced Profile User Interface to assign the new record types to the Personal Banker and Advisor profiles. When advisors and personal bankers create a group, this custom record type is available to use.

SEE ALSO:
What Is a Group?
Financial Services Cloud provides a framework for alerts so that users can get timely alerts about clients and act as necessary.

Use the Alerts API to push financial account alerts from an external system, such as a transactional system, to Financial Services Cloud. The alert appears in Financial Services Cloud when a user views an individual’s profile or a financial account page. Financial Services Cloud 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 and Personal Banker profiles. For users to access alerts, assign the following permissions through their 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**.

### 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.

**Enable Multiple Relationship Groups**

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

**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.

**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.
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.

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.
Customize Your Implementation

Group Member Details Setup

You can set up the Group Members (Configurable) Lightning component so that users can see configured member data from one page.

Create a Field Set for Group Member (Configurable) Component

A custom field set includes information about group members and appears on the Relationships tab in an individual’s profile.

Customize the Group Members (Configurable) Component

To give users member data that is configured for your business, replace the Group Members Lightning component on a custom client record page.

Create a Field Set for Group Member (Configurable) Component

A custom field set includes information about group members and appears on the Relationships tab in an individual’s profile.

Complete these steps from Salesforce Classic.

1. Create an Account object field set to include member details on the Member Details (Configurable) component on the Relationships tab.
   a. From Setup, enter account in Quick Find, then select Field Sets.
   b. Enter the field set information.
      Example:
      • Field Set Label—Group Member Details
      • Field Set Name—WM_Client_Groups_Member_Details
      • Where is this used?—Client profile’s Relationships tab
   c. Save your changes.
   d. In the palette, select the Account category, and then drag fields to In the Field Set.
Example:

- Account Name
- Record Type ID > Name

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

- Category
- Total Financial Accounts

E. Save your changes.

Customize the Group Members (Configurable) Component

To give users member data that is configured for your business, replace the Group Members Lightning component on a custom client record page.

1. From Setup, enter Lightning in Quick Find, then select Lightning App Builder.
2. Next to the Client Record Page click Clone. Label and save your custom client record page.
3. Next to the Client Record Page click Edit.
4. From the Lightning App Builder, on the client record page, click the Relationships tab.
5. Drag the Group Members (Configurable) component to the client record page under the relationship map component.

6. Enter the field set name for the Group Members (Configurable) component. Example
7. Under the Group Members (Configurable) component, remove the previous Group Members component.
8. Save your changes.
9. To exit Lightning App Builder, click Back and then refresh your browser.

Reorder Account and Contact Information

Arrange the order of the account and contact information to suit your users’ needs. From Lightning App Builder, show contact details at the top of the client record page and account information at the bottom, or vice versa. You can also rearrange Account and Contact Related Lists on the Related tab.

1. From Setup, enter Lightning App Builder in Quick Find, then select Lightning App Builder.
2. Click Edit next to your custom client record page.
3. From the Details tab, click the Client Record Detail component.
4. Select Show Contact Details at Top.
5. From the Related tab, click the Client Related List component.
6. Select Show Contact Section at Top.
7. Save your changes.

Reorder an Individual’s First Name and Last Name

You can change the order in which individuals’ first name and last name appear on the details page.

1. From Setup, enter Custom Settings in Quick Find, then select Custom Settings.
2. Click Industries Application Config.
3. Click Manage and then click Edit.
4. In Account Name Format, enter one of these supported formats.
   - {firstname} {lastname}
   - {lastname} {firstname}
   
   Note: If a format is not entered correctly, the {firstname} {lastname} format is applied by default.
5. Save your changes.
   The account name format is applied after you make any edit to an individual’s name.
6. For {lastname} {firstname} format only, change the org’s Default Locale to the appropriate locale so that the {lastname} {firstname} format appears in the Contact Details section for all individuals.

Set Up a New Lightning Page for Contact Records

When you create an org default 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. For details on how, see Build a Custom Record Page for Lightning Experience.

2. In the Lightning App Builder, edit the new contact record page.

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.

Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

SEE ALSO: Enable Action Plans

Enable Insurance for Financial Services Cloud

Insurance for Financial Services Cloud includes a new data model for insurance, new Lightning components, and a tailored Lightning console app: Insurance Agent Console. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals. When you add the Policy and Life Events or Business Milestones components to the account record page, agents have a consolidated view of their customers’ life events or business milestones, insurance policies, claims, and other related details. Use the Insurance Agent Portal template to create a portal that gives independent insurance agents access to the insurance features and components and lets them manage and grow their books of business.
**Set Up Insurance for Financial Services Cloud**

To enable Insurance for Financial Services Cloud, clone an Account record page or create one, and add the Policy and Life Events or Business Milestones components to the page. Then activate the page and assign it to the Insurance Agent Console app, appropriate account and person account record types, and appropriate user profiles. Add the Insurance Agent Action Items component to the Insurance Agent Console Home page. Then give users access to the Insurance Agent Console app.

**Work with Insurance for Financial Services Cloud**

Discover the information you need and the customizations you can do to fine-tune the Insurance features to best suit the needs of your agents and service reps.

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**Assign the FSC Insurance Permission Set License to Users**

To access insurance-specific objects and features, users need the FSC Insurance permission set license.

**Give Users Access to Additional Objects and Functionality (Optional)**

Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can't disable them.

**Edit Sharing Settings for Insurance Objects**

You can control access to data at different levels. For example, you can control the access that a user has to objects by assigning object permissions. Within an object, you can control which fields a user has access to by using field-level security. You can control access to data at the record level by assigning sharing settings. Review the default sharing settings for Insurance objects and modify them based on your needs.

**Encrypt the Insurance Fields**

Protect your policyholders’ sensitive information with Shield Platform Encryption. You can encrypt information about a range of life events, business milestones, insurance policies, claims, and related details with either probabilistic or deterministic encryption schemes.

**Give Agents a Consolidated View of Policyholders’ Life Events, Policies, and Claims**

Give your insurance agents a 360-degree view of their customers’ life events or business milestones, insurance policies, claims, and other important details. Start by cloning an Account record page or creating one. Then add the Policy and Life Events or Business Milestones components to the page.

**Enable Policy and Claim Rollups**

Add the provided rollup-by-lookup (RBL) summaries on the account household page layout to show total household policies, policy premiums, claims on policies, and claim amount paid by a policyholder’s primary household. Then activate the RBL rules to calculate the summaries.
Add the Insurance Agent Action Items Component to the Console Home Page
The Insurance Agent Action Items component gives agents an at-a-glance view of payment-due policies, policies up for renewal, open claims and cases, unread leads, and open opportunities. Add the component to the Insurance Agent Console app’s home page.

Give Users Access to the Insurance Agent Console App
Add user profiles to the Insurance Agent Console app to give users access to the Insurance Agent Console app. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals.

Set Up a Portal for Independent Insurance Agents
Create a feature-rich portal for your independent insurance agents. A dashboard with performance metrics, report charts, and action items helps agents monitor their goals and accomplishments, meet deadlines, and improve sales and service. With a comprehensive view of clients’ policies, claims, life events or business milestones, and other related details, agents can stay organized, deepen client relationships, and better address client needs. Agents can use built-in Community Cloud and knowledge management features to share knowledge articles with other agents and insurance carriers.

Assign the FSC Insurance Permission Set License to Users
To access insurance-specific objects and features, users need the FSC Insurance permission set license.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click the user that you want to give permissions to.
3. Under Permission Set Assignments, click Edit Assignments.
4. Under Available Permission Sets, select FSC Insurance, and then click Add.
5. Save your changes.

Note: Assigning the FSC Insurance permission set automatically assigns the user an FSC Insurance permission set license. However, assigning the permission set doesn’t give the user permissions on insurance-specific objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

Give Users Access to Additional Objects and Functionality (Optional)
Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can’t disable them.

1. From Setup, in the Quick Find box, enter Insurance Settings, and then select Insurance Settings.
2. To give an agent access to the master list of coverage types, enable Access Master List of Coverage Types.
3. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable Use Many-to-Many Relationships.
Once this option is enabled, you can see these additional objects: Claim Case, Insurance Claim Asset, and Insurance Policy Member Asset.

4. To let multiple producers work on the same policy, enable Let Multiple Producers Work on the Same Policy. Once this option is enabled, you can see an extra object, Producer Policy Assignment.

**Edit Sharing Settings for Insurance Objects**

You can control access to data at different levels. For example, you can control the access that a user has to objects by assigning object permissions. Within an object, you can control which fields a user has access to by using field-level security. You can control access to data at the record level by assigning sharing settings. Review the default sharing settings for Insurance objects and modify them based on your needs.

1. From Setup, in the Quick Find box, enter Sharing Settings, and then select Sharing Settings.

2. Under Organization-Wide Defaults, review the access levels for the following objects. By default, they are set to Private.
   - Business Milestone
   - Claim
   - Coverage Type (available when the Access Master List of Coverage Types org pref is enabled)
   - Customer Property
   - Insurance Policy
   - Insurance Policy Asset
   - Producer
   - Producer Policy Assignment (available when the Let Multiple Producers Work on the Same Policy org pref is enabled)
   - Product Coverage (available when the Access Master List of Coverage Types org pref is enabled)
   - Securities Holding
   - Worker Compensation Coverage Class

3. To change an access level, click Edit.

4. For each object, select the default access you want to use.

5. Save your changes.

**Encrypt the Insurance Fields**

Protect your policyholders’ sensitive information with Shield Platform Encryption. You can encrypt information about a range of life events, business milestones, insurance policies, claims, and related details with either probabilistic or deterministic encryption schemes.

<table>
<thead>
<tr>
<th>Object</th>
<th>Fields You can Encrypt</th>
</tr>
</thead>
<tbody>
<tr>
<td>BusinessMilestone</td>
<td>MilestoneName</td>
</tr>
<tr>
<td>Claim</td>
<td>ClaimNumber</td>
</tr>
</tbody>
</table>

---

Available in Lightning Experience in Enterprise, Professional, and Unlimited Editions that have Financial Services Cloud enabled.
<table>
<thead>
<tr>
<th>Object</th>
<th>Fields You can Encrypt</th>
</tr>
</thead>
<tbody>
<tr>
<td>IncidentSite</td>
<td>• IncidentSite</td>
</tr>
<tr>
<td></td>
<td>• ReportNumber</td>
</tr>
<tr>
<td>CustomerProperty</td>
<td>• Address</td>
</tr>
<tr>
<td></td>
<td>• LienHolderName</td>
</tr>
<tr>
<td>IdentityDocument</td>
<td>• Name</td>
</tr>
<tr>
<td></td>
<td>• ExpirationDate</td>
</tr>
<tr>
<td></td>
<td>• IssueDate</td>
</tr>
<tr>
<td>InsurancePolicy</td>
<td>• PolicyNumber</td>
</tr>
<tr>
<td></td>
<td>• ServicingOffice</td>
</tr>
<tr>
<td></td>
<td>• UniversalPolicyNumber</td>
</tr>
<tr>
<td>PersonLifeEvent</td>
<td>EventName</td>
</tr>
<tr>
<td>SecuritiesHolding</td>
<td>Name</td>
</tr>
</tbody>
</table>

SEE ALSO:

Which Standard Fields Can I Encrypt?

Give Agents a Consolidated View of Policyholders’ Life Events, Policies, and Claims

Give your insurance agents a 360-degree view of their customers’ life events or business milestones, insurance policies, claims, and other important details. Start by cloning an Account record page or creating one. Then add the Policy and Life Events or Business Milestones components to the page.

Create a Custom Account Record Page

To quickly create an Account record page, you can clone an existing one. After you create the page, you can modify it to give agents a customized view of their clients’ records.

Configure Related Lists for Policies, Life Events, and Business Milestones

Before you add the Policy and Life Events or Business Milestones components to your Account record page, add the components as related lists on the relevant page layouts. To make the lists of insurance policies, claims, life events, and business milestones available on your custom Account record page, add the lists to the Related Lists sections of the page layouts for the Account, Person Account (if enabled), and Contact objects.

Add Policy and Life Events or Business Milestones Components to Your Account Record Page

Add the Policy and Life Events or Business Milestones components to your custom Account record page to give agents a consolidated view of their customers’ life events or business milestones, insurance policies, claims, and other related details.

Activate the Custom Account Record Page

Activate your custom Account record page to make it visible to your users.
Create a Custom Account Record Page

To quickly create an Account record page, you can clone an existing one. After you create the page, you can modify it to give agents a customized view of their clients’ records.

1. From Setup, in the Quick Find box, enter App Builder, and then select Lightning App Builder.
2. Clone an Account record page. (An Account record page is a page whose object name is Account and type is Record Page.) If an Account record page is not available, create one.
3. Give your page an appropriate label. For example, name it PolicyHolder 360.
4. Save the page. When you save the page for the first time, you are prompted to activate it to make it available to users. Click Not Yet.

You activate the page later when you are done customizing it and it’s ready for your users.

Configure Related Lists for Policies, Life Events, and Business Milestones

Before you add the Policy and Life Events or Business Milestones components to your Account record page, add the components as related lists on the relevant page layouts. To make the lists of insurance policies, claims, life events, and business milestones available on your custom Account record page, add the lists to the Related Lists sections of the page layouts for the Account, Person Account (if enabled), and Contact objects.

1. From Setup, open Object Manager.
2. Click Account, and select Page Layouts.
3. For each page layout that you want to add the Insurance Policies list to, select Related Lists on the palette. Then drag Insurance Policies to the Related Lists section.
4. Save your changes.
5. Similarly, configure related lists for the relevant page layouts for the following objects.

<table>
<thead>
<tr>
<th>Object</th>
<th>Related Lists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Business Milestones</td>
</tr>
<tr>
<td>Person Account</td>
<td>Claims, Insurance Policies, Insurance Policy Participants, Person Life Events</td>
</tr>
<tr>
<td>Contact</td>
<td>Person Life Events</td>
</tr>
</tbody>
</table>

**Note:** The Person Life Events related list is available only when person accounts are enabled in your org.

Add Policy and Life Events or Business Milestones Components to Your Account Record Page

Add the Policy and Life Events or Business Milestones components to your custom Account record page to give agents a consolidated view of their customers’ life events or business milestones, insurance policies, claims, and other related details.

1. From Setup, in the Quick Find box, enter App Builder, and then select Lightning App Builder.
2. In the Lightning Pages list, click Edit next to your Account record page.
3. Drag the Life Events or Business Milestones component to the account summary.

4. Create a custom tab. Give it an appropriate label. For example, name it Policies.

5. Drag the Policy component to the new tab.

6. Click anywhere on the Policy component to select it.

7. In the Properties pane, review the preselected policy KPIs, and change them according to your needs.

8. In the Properties pane, under Choose Participant Role, click Select, and then select the appropriate participant roles.

   By default, no participant role is selected. As a result, when an agent views a user’s record, the Policies tab shows only those policies that the user owns. Selecting participant roles includes policies in which the user is a participant but doesn’t own. For example, if you select the Beneficiary participant role, the list includes the policies in which the user is a beneficiary.

9. Save your changes.

Activate the Custom Account Record Page

Activate your custom Account record page to make it visible to your users.

1. On your custom Account record page, click Activation.

2. Choose how you want to activate the page.

   • To make the page the default object record page for specific Lightning apps, click the APP DEFAULT tab and follow the steps. For example, you can make the page the default object record page for the Insurance Agent Console page.

   • To assign the page to a combination of Lightning apps, record types, and profiles, click the APP, RECORD TYPE, AND PROFILE tab and follow the steps. For example, you can assign the page to the Insurance Agent Console app, Person Account record type, and Insurance Agent profile.

Here’s what your custom Account record page, PolicyHolder 360, looks like when an insurance agent views a client’s record.
Enable Policy and Claim Rollups

Add the provided rollup-by-lookup (RBL) summaries on the account household page layout to show total household policies, policy premiums, claims on policies, and claim amount paid by a policyholder’s primary household. Then activate the RBL rules to calculate the summaries.

1. From the App Launcher, under All Items, select **Rollup By Lookup Configurations**.
2. Change the list view to **All**.
3. For each of the following rules, select the check box in the Active column.
   - RBLForTotalNumberPoliciesHH
   - RBLForGWHH
   - RBLForTotalNumberClaimHH
   - RBLForClaimPaidHH

**SEE ALSO:**
Rollups in Financial Services Cloud

Add the Insurance Agent Action Items Component to the Console Home Page

The Insurance Agent Action Items component gives agents an at-a-glance view of payment-due policies, policies up for renewal, open claims and cases, unread leads, and open opportunities. Add the component to the Insurance Agent Console app's home page.

1. On the Insurance Agent Console home page, from Setup, select **Edit Page**.
2. Drag the Insurance Agent Action Items component to the highlights panel or the side panel.
3. Click anywhere on the Insurance Agent Action Items component to select it.
4. In the Properties pane, choose up to four metrics to show on the home page.
5. Select a time period.

**Note:** The time period that you select applies to only policy-related metrics. Other metrics related to cases, claims, leads, and opportunities display the total count irrespective of the time period.
Give Users Access to the Insurance Agent Console App

Add user profiles to the Insurance Agent Console app to give users access to the Insurance Agent Console app. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals.

1. From Setup, in the Quick Find box, enter App Manager, and then select App Manager.
2. On the Insurance Agent Console app’s row, click Edit, and then select Edit.
4. Under Available Profiles, select a profile, and then click Add.
5. Save your changes.

Set Up a Portal for Independent Insurance Agents

Create a feature-rich portal for your independent insurance agents. A dashboard with performance metrics, report charts, and action items helps agents monitor their goals and accomplishments, meet deadlines, and improve sales and service. With a comprehensive view of clients’ policies, claims, life events or business milestones, and other related details, agents can stay organized, deepen client relationships, and better address client needs. Agents can use built-in Community Cloud and knowledge management features to share knowledge articles with other agents and insurance carriers.

Create a Portal for Agents

Use the Insurance Agent Portal Lightning template to create a portal for your independent insurance agents. Key Insurance features and all Insurance Lightning components are available and fully functional in the Insurance Agent Portal template.

Grant Users Access to the Portal

To access the features available in the portal, users need the Insurance Community User permission set.

Create a Portal for Agents

Use the Insurance Agent Portal Lightning template to create a portal for your independent insurance agents. Key Insurance features and all Insurance Lightning components are available and fully functional in the Insurance Agent Portal template.

1. From Setup, in the Quick Find box, enter All Communities, and then select All Communities.
2. Click New Community.
3. Select the Insurance Agent Portal template, and click Get Started.
4. Enter a Name and a URL for the portal, and click Create.
5. Click Builder.
6. Customize the portal to suit your business needs, preview the customized portal, and then publish it.
Grant Users Access to the Portal

To access the features available in the portal, users need the Insurance Community User permission set.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click the user that you want to give permissions to.
3. Under Permission Set Assignments, click Edit Assignments.
4. Under Available Permission Sets, select Insurance Community User, and then click Add.
5. Save your changes.

Note: Assigning the Insurance Community User permission set automatically assigns the user an FSC Insurance for Community permission set license. The permission set also grants the user access to the objects and components in the portal. However, it doesn’t give any permissions on the objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

Tip: The default community profiles in the Financial Services Cloud don’t have permissions on the insurance objects. To use these profiles for portal users, grant them create, read, edit, and delete permissions on the insurance objects.

Work with Insurance for Financial Services Cloud

Discover the information you need and the customizations you can do to fine-tune the Insurance features to best suit the needs of your agents and service reps.

Customize the Insurance Agent Console Home Page

By default, the Insurance Agent Console app’s home page shows various performance metrics and report charts. You can choose which metrics and charts to show based on your users’ needs.

Life Events and Business Milestones

The Life Events or Business Milestones component shows life events for a person account record page and business milestones for a business account record page. You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive life event types and business milestone types, create contextual actions for life events and business milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and business milestones. Plus, you can choose the details your users see when they hover over a life event or business milestone.

Show the Most Relevant Policy and Claim Details on the Policy Component

The Policies component shows policies, claims, and renewals to help agents plan their day-to-day work, stay on top of their targets, and better serve their clients. You can choose which information to show by customizing the Insurance Policies related list.

Expand or Collapse Policy Types by Default

On account record pages, policies are grouped by policy types. You can determine whether the policy types are expanded or collapsed when an account record page loads.

Automatically Mark a Policy Inactive Based on the Policy Status

Rather than manually changing the status of each insurance policy, you can map an attribute to a status. When an insurance policy changes to the mapped status, it’s automatically marked inactive.

Automatically Close a Claim Based on Claim Status

Rather than manually changing the status of each claim, you can map an attribute to a status. When a claim changes to the mapped status, it’s automatically marked closed.
Path Settings for Insurance Policy and Claim Objects
Path is available for insurance policies and claims. You can set up paths for these objects.

Use Custom Icons for Event, Milestone, and Policy Types
You can change the default icon associated with a life event type, business milestone type, or policy type. Upload an SVG file to replace the icon.

Create Action Plan Templates for Insurance Objects
You can create action plan templates for the Person Life Event, Business Milestone, Insurance Policy, Insurance Policy Coverage, and Claim objects. Use the action plan templates to capture repeatable tasks and automatically assign task owners and deadlines.

Configure Alerts for Policies and Claims
You can push alerts on clients’ policies and claims from your core policy management system. Alerts appear when an agent views a client’s policies or claims on the account page.

Considerations for Working with Insurance for Financial Services Cloud
Before you start using the features in Insurance for Financial Services Cloud, review these considerations.

Customize the Insurance Agent Console Home Page
By default, the Insurance Agent Console app’s home page shows various performance metrics and report charts. You can choose which metrics and charts to show based on your users’ needs.

2. Click anywhere on the Insurance Agent Performance Metrics component to select it.
3. In the Properties pane, choose up to five metrics to show on the home page.
4. Click anywhere on the Insurance Agent Performance Reports component to select it.
5. In the Properties pane, choose up to four charts to show on the home page.
6. Click anywhere on the Insurance Agent Action Items component to select it.
7. In the Properties pane, choose up to four metrics to show on the home page.
8. Select a time period.

Note: The time period that you select applies to only policy-related metrics. Other metrics related to cases, claims, leads, and opportunities display the total count irrespective of the time period.

9. Save your changes.
10. In the Page Saved dialog, click Activate. Or, click Activation on the home page.
11. On the APP AND PROFILE tab, click Assign to Apps and Profiles.
12. In the wizard, select Insurance Agent Console, select the appropriate profiles, and then click Save.

Here’s what the Insurance Agent Console home page looks like.
Life Events and Business Milestones

The Life Events or Business Milestones component shows life events for a person account record page and business milestones for a business account record page. You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive life event types and business milestone types, create contextual actions for life events and business milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and business milestones. Plus, you can choose the details your users see when they hover over a life event or business milestone.

Note: Event Type and Business Milestone picklist values are in English, but you can translate them using the Translation Workbench.

Create Event or Milestone Types
If the provided event types or milestone types don’t address your business needs, you can create additional types.

Add or Remove Event or Milestone Types
You can deactivate event types or milestone types that aren’t relevant.

Capture Once-in-a-Lifetime Events with Unique Event Types
Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

Choose the Event or Milestone Details to Show on Hover
When you hover over a life event or business milestone, an expanded lookup card displays the key fields from the event or milestone record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

Hide Sensitive Life Event Types and Business Milestone Types
Hide life event types or business milestone types that can cause customer resentment if the customer hasn’t yet achieved or isn’t likely to ever achieve an event or milestone of that type. When you hide a life event or business milestone type, it doesn’t appear on the component until you add an event or milestone of that type.
Create and Configure Contextual Actions for Life Events and Business Milestones

Agents can quickly create a record and associate it with a life event or business milestone without leaving the page they're on. For example, when viewing a car purchase event, the agent can quickly create an opportunity for selling an auto insurance policy. The Opportunity record is automatically associated with the life event. Create relevant actions for life events and business milestones. Add the actions to the appropriate page layouts so that they appear in the expanded lookup card when an agent hovers over a life event or business milestone.

Expire Obsolete Life Events or Business Milestones

Expire the life events or business milestones that are no longer valid. For example, expire a car purchase event after the client has sold the car.

Create Event or Milestone Types

If the provided event types or milestone types don’t address your business needs, you can create additional types.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.
   Note: To create milestone types, select Business Milestone.
3. Click Fields & Relationships, and then select Event Type or Milestone Type.
4. Under Event Type Picklist Values or Milestone Type Picklist Values, click New, and then add the new event types or milestone types.
5. Save your changes.
   Note: If your org uses the Translation Workbench, notify your translators when you add or change picklist values.

Add or Remove Event or Milestone Types

You can deactivate event types or milestone types that aren’t relevant.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.
   Note: To deactivate milestone types, select Business Milestone.
3. Click Fields & Relationships, and then select Event Type or Milestone Type.
4. Under Event Type Picklist Values or Milestone Type Picklist Values, click Deactivate next to the value that you want to deactivate.
   To activate an inactive event type or milestone type, under Inactive Values, click Activate next to the value.
5. Save your changes.
Capture Once-in-a-Lifetime Events with Unique Event Types

Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.

   Note: To mark milestone types unique, select Business Milestone.

3. Click Fields & Relationships, and then select Event Type or Milestone Type.
4. Under Event Type Picklist Values or Milestone Type Picklist Values, next to the value that you want to mark unique, click Edit, and select Unique.
5. Save your changes.

Choose the Event or Milestone Details to Show on Hover

When you hover over a life event or business milestone, an expanded lookup card displays the key fields from the event or milestone record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

1. From Setup, open Object Manager.
2. Click Person Life Event or Business Milestone, and select Compact Layouts.
3. Clone the System Default layout, or click New to create a compact layout.
4. Enter a label for the compact layout, and add the fields to include.
5. Sort the fields in the order that you want them displayed by clicking Up or Down.

   Tip: Put the object’s Name field first to provide users context when they hover over a life event or business milestone.

6. Save the layout.
7. Click Compact Layout Assignment, and then click Edit Assignment.
8. From the Primary Compact Layout list, select your compact layout.
9. Save your changes.

Hide Sensitive Life Event Types and Business Milestone Types

Hide life event types or business milestone types that can cause customer resentment if the customer hasn’t yet achieved or isn’t likely to ever achieve an event or milestone of that type. When you hide a life event or business milestone type, it doesn’t appear on the component until you add an event or milestone of that type.

1. On the account record page, from Setup, select Edit Page.
2. Click anywhere on the Life Events or Business Milestones component to select it.
3. In the Properties pane, depending on the record page you are on (person account or business account), click Select under Hide Event Types or Hide Milestone Types.
4. Select the event types or milestone types that you want to hide, and click OK.

5. Save the page.

Create and Configure Contextual Actions for Life Events and Business Milestones

Agents can quickly create a record and associate it with a life event or business milestone without leaving the page they’re on. For example, when viewing a car purchase event, the agent can quickly create an opportunity for selling an auto insurance policy. The Opportunity record is automatically associated with the life event. Create relevant actions for life events and business milestones. Add the actions to the appropriate page layouts so that they appear in the expanded lookup card when an agent hovers over a life event or business milestone.

If Action Plans is enabled in your Salesforce org, the New Action Plan action is, by default, available for life events and business milestones. Create action plan templates for Person Life Event and Business Milestone objects. An agent can choose from these templates when creating an action plan from an event or milestone.

1. From Setup, open Object Manager.

2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.

   **Note:** To create actions for business milestones, select Business Milestone.

3. Click Buttons, Links, and Actions, and then click New Action.

4. In the Action Type list, select the type of action that you want to create. For example, select Create a Record.

5. In the Target Object list, select the type of object record this action creates, such as a contact or an opportunity.

6. Enter a label for the action. Users see this label as the name of the action.
7. Save your changes.
8. Click **Page Layouts**, and then select the appropriate page layout.
9. On the palette, select **Mobile & Lightning Actions**.
10. Drag the action to the Salesforce Mobile and Lightning Experience Actions section.
11. Save your changes.

### Expire Obsolete Life Events or Business Milestones

Expire the life events or business milestones that are no longer valid. For example, expire a car purchase event after the client has sold the car.

1. Hover over a life event type or business milestone, and click the event or milestone that you want to expire.
2. On the Details tab, edit the record, and select **Expired**.
3. Click **Save**. The expired event or milestone appears crossed out.

### Show the Most Relevant Policy and Claim Details on the Policy Component

The Policies component shows policies, claims, and renewals to help agents plan their day-to-day work, stay on top of their targets, and better serve their clients. You can choose which information to show by customizing the Insurance Policies related list.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter **Person Account**, and then select **Person Account**.
3. Click **Page Layouts**, and then select **Person Account Layout**.
4. On the palette, select **Related Lists**.
5. Under Related Lists, double-click the **Insurance Policies** related list or click the wrench icon (🔧).
6. Under Columns, select up to 10 fields to include in the related list, and define the order in which the fields display. Select how to sort the records. The default is by record ID.
7. Click **OK**. Your changes aren't saved until you save the page layout.
8. Save the page layout.
Expand or Collapse Policy Types by Default

On account record pages, policies are grouped by policy types. You can determine whether the policy types are expanded or collapsed when an account record page loads.

1. On the account record page, from Setup, select **Edit Page**.
2. Click anywhere on the Policy component to select it.
3. In the Properties pane, select or deselect **Expand all policy types by default**.

![Image of expand or collapse policy types](image)

**Note:** When this option is selected, the record page may take longer to load if the account has several policies.

Automatically Mark a Policy Inactive Based on the Policy Status

Rather than manually changing the status of each insurance policy, you can map an attribute to a status. When an insurance policy changes to the mapped status, it’s automatically marked inactive.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter **Insurance Policy**, and then select **Insurance Policy**.
3. Click **Fields & Relationships**, and then select **Status**.
4. Under Status Picklist Values, next to the value that you want to map, click **Edit**, and select **Inactive**.
5. Save your changes.

Automatically Close a Claim Based on Claim Status

Rather than manually changing the status of each claim, you can map an attribute to a status. When a claim changes to the mapped status, it’s automatically marked closed.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter **Claim**, and then select **Claim**.
3. Click **Fields & Relationships**, and then select **Status**.
4. Under Status Picklist Values, next to the value that you want to map, click **Edit**, and select **Closed**.
5. Save your changes.
Path Settings for Insurance Policy and Claim Objects

Path is available for insurance policies and claims. You can set up paths for these objects.

Use Custom Icons for Event, Milestone, and Policy Types

You can change the default icon associated with a life event type, business milestone type, or policy type. Upload an SVG file to replace the icon.

1. From Setup, in the Quick Find box, enter Icons, and then select Icons.
2. To change icons for policy types, select Insurance Policies. To change icons for life event types or business milestone types, select Life Events and Business Milestones.
3. For the icon that you want to change, click , and select Change Icon.
4. Click Upload Files, and select the SVG file for the icon.
5. Save your changes.

Create Action Plan Templates for Insurance Objects

You can create action plan templates for the Person Life Event, Business Milestone, Insurance Policy, Insurance Policy Coverage, and Claim objects. Use the action plan templates to capture repeatable tasks and automatically assign task owners and deadlines.

SEE ALSO:
   Enable Action Plans

Configure Alerts for Policies and Claims

You can push alerts on clients’ policies and claims from your core policy management system. Alerts appear when an agent views a client’s policies or claims on the account page.

SEE ALSO:
   Financial Services Cloud Alerts
Considerations for Working with Insurance for Financial Services Cloud

Before you start using the features in Insurance for Financial Services Cloud, review these considerations.

**Considerations for Metrics and Charts on the Insurance Agent Console Home Page**

Review these points to better understand the information that appears in charts and metrics on the Insurance Agent Console home page.

**Considerations for Policies and Claims**

Review these points to better understand the information that appears on the Policy component.

**Considerations for Life Events and Business Milestones**

Review these points to better understand the information that appears on the Life Events or Business Milestones component.

**Considerations for Metrics and Charts on the Insurance Agent Console Home Page**

Review these points to better understand the information that appears in charts and metrics on the Insurance Agent Console home page.

- In charts, the policies and policy premiums are grouped by policy type. Policies without a policy type are grouped under a type represented by a hyphen (-).

- By default, the MTD (Month to Date) filter is applied to the metrics and charts wherever applicable. Although MTD signifies Month to Date, it includes records for the entire month and not just from the first of the month to the current date. Similarly, QTD (Quarter to Date) and YTD (Year to Date) include data for the entire quarter and year.

- Filter selections don’t persist across user sessions. They are reset to MTD the next time you log in.

- In metrics, currency ISO codes are used in place of currency symbols. For example, the Premium of Policies Sold metric shows USD 2500 instead of $2500.
• The sale-related metrics and charts include all new policies irrespective of whether they are active or inactive.

• When calculating the renewal-related metrics and charts, the following conditions apply.
  – Only active policies are counted.
  – If both the DateRenewed and PreviousRenewalDate values are available, DateRenewed is used to calculate the metrics and charts.
  – Only the most recent renewal of a policy in the selected time period is counted. For example, in a quarter, if five of an agent’s six policies were renewed once and the sixth policy was renewed once every month of the quarter, the Policies Renewed metric shows six renewals for that quarter.

• When a policy is renewed, depending on how policy records are managed in your Salesforce org, perform one of these steps to ensure that the renewal-related charts and metrics are correctly calculated.
  – If a new record is created for each renewal of the policy, mark the old policy record inactive (IsActive = False).
  – If the same record is updated for every renewal of the policy, clear the DateRenewed field after the new policy comes into effect.

• A metric or chart includes a record only when certain fields in that record are populated and they match the criteria specific to that metric or chart. For example, when calculating the Policies Sold metric, a policy is counted only when it meets all these criteria:
  – The policy has a producer (ProducerId) associated with it, and the InternalUserId on the Producer object is mapped to the logged-in user.
  – The date on which the policy was sold (SaleDate) is within the selected time period (MTD, QTD, or YTD).
  – The policy is a new policy and not a renewed policy (IsRenewedPolicy = False).

Use these tables to learn how metrics and charts are calculated.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies Sold</td>
<td>The number of policies sold by the insurance agent.</td>
<td>COUNT (Id) FROM InsurancePolicy WHERE ProducerId.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period</td>
</tr>
<tr>
<td>Premium of Policies Sold</td>
<td>The sum of the premium for the policies sold by the insurance agent.</td>
<td>SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE ProducerId.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period</td>
</tr>
<tr>
<td>Policies Renewed</td>
<td>The number of policies renewed by the insurance agent.</td>
<td>COUNT (Id) FROM InsurancePolicy WHERE ProducerId.InternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True</td>
</tr>
<tr>
<td>Premium of Policies Renewed</td>
<td>The sum of the premium for the policies renewed by the insurance agent.</td>
<td>SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE ProducerId.InternalUserId = Current User</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Calculation</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Policy Renewal Rate</td>
<td>The percentage of policies that were renewed.</td>
<td>AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True / (COUNT (InsurancePolicy.Id) with DateRenewed OR PreviousRenewalDate IN Selected Time Period AND IsActive = True + COUNT (InsurancePolicy.Id) with RenewalDate OR FinalRenewalDate IN Selected Time Period AND DateRenewed = NULL AND IsActive = True)</td>
</tr>
<tr>
<td>Lead Conversion Ratio</td>
<td>The percentage of leads that were converted into opportunities.</td>
<td>% Leads WHERE OwnerId = Current User AND IsConverted = True AND CreatedDate IN Selected Time Period</td>
</tr>
<tr>
<td>Cases Closed</td>
<td>The number of cases closed by the service rep.</td>
<td>COUNT (Id) FROM Case WHERE OwnerId = Current User AND Status = Closed AND ClosedDate IN Selected Time Period</td>
</tr>
<tr>
<td>Case Closure Time</td>
<td>The average number of days the service rep took to close a case.</td>
<td>AVG (ClosedDate - CreatedDate) WHERE Status = Closed AND OwnerID = Current User AND ClosedDate IN Selected Time Period</td>
</tr>
<tr>
<td>Claims Settled</td>
<td>The number of claims settled by the service rep.</td>
<td>COUNT (Id) FROM Claim WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period</td>
</tr>
<tr>
<td>Claim Settlement Time</td>
<td>The average number of days the service rep took to settle a claim.</td>
<td>AVG (InitiationDate - FinalizedDate) WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period</td>
</tr>
</tbody>
</table>
| Sales Performance by Policy Type | The number of policies sold and the sum of the premium for those policies. The records are grouped by policy type. | Number of policies sold = COUNT (Id) FROM InsurancePolicy WHERE ProducerId.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)  
Total premium = SUM (GrossWrittenPremium) FROM |
<table>
<thead>
<tr>
<th>Report Chart</th>
<th>Description</th>
<th>Calculation</th>
</tr>
</thead>
</table>
| Renewals Performance by Policy Type| The number of policies renewed and the sum of the premium for those policies. The records are grouped by policy type. | Premium for policies renewed = \( \sum \text{(GrossWrittenPremium)} \) FROM InsurancePolicy WHERE ProducerInternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True, GROUP BY PolicyType  
Premium for policies yet to be renewed = \( \sum \text{(GrossWrittenPremium)} \) FROM InsurancePolicy WHERE ProducerInternalUserId = Current User AND (RenewalDate OR FinalRenewalDate IN Selected Time Period) AND DateRenewed = NULL AND IsActive = True, GROUP BY PolicyType |
| Monthly Sales and Renewals         | The sum of the premium for the policies sold and policies renewed in the past twelve months. The records are grouped by month.                        | Policies sold = \( \sum \text{(GrossWrittenPremium)} \) FROM InsurancePolicy WHERE ProducerInternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Last 12 Months, GROUP BY Calendar_Year (SaleDate), Calendar_Month (SaleDate), ORDER BY Calendar_Year (SaleDate), Calendar_Month (SaleDate)  
Policies renewed = \( \sum \text{(GrossWrittenPremium)} \) FROM InsurancePolicy WHERE ProducerInternalUserId = Current User AND IsActive = True AND (DateRenewed OR PreviousRenewalDate IN Last 12 Months) AND DateRenewed = NULL, GROUP BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed), ORDER BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed) |
### Report Chart

**Average Opportunity Closure Time**
- **Description:** The average time the agent took to close an opportunity. The records are grouped by policy type.
- **Calculation:**
  
  $$\text{AVG} (\text{SourceOpportunity.CloseDate} - \text{SourceOpportunity.CreatedDate}) \text{ FROM InsurancePolicy WHERE ProducerId.InternalUserId = \text{Current User AND SourceOpportunity.CloseDate IN Last 6 Months}, GROUP BY Calendar\_Month (SourceOpportunity.CloseDate), ORDER BY Calendar\_Month (SourceOpportunity.CloseDate)}$$

**Cases Closed and Average Closure Time**
- **Description:** The number of cases closed by the service rep and the average time taken to close a case. The records are grouped by case type.
- **Calculation:**
  
  $$\text{Cases closed} = \text{COUNT (Id) FROM Case WHERE OwnerId = \text{Current User AND Status = Closed AND ClosedDate IN Selected Time Period, ORDER BY Type}}$$
  
  $$\text{Average closure time} = \text{AVG} (\text{ClosedDate - CreatedDate}) \text{ WHERE Status = Closed AND OwnerId = \text{Current User AND ClosedDate IN Selected Time Period, ORDER BY Type}}$$

**Claims Settled and Average Settlement Time**
- **Description:** The number of claims settled by the service rep and the average time taken to settle a claim. The records are grouped by claim type.
- **Calculation:**
  
  $$\text{Claims settled} = \text{COUNT (Id) FROM Claim WHERE OwnerId = \text{Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType}}$$
  
  $$\text{Average settlement time} = \text{AVG} (\text{InitiationDate - FinalizedDate}) \text{ WHERE OwnerId = \text{Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType}}$$

- The policy-related metrics on the Insurance Agent Action Items component include only active policies.

Use this table to learn how the metrics on the Insurance Agent Action Items component are calculated.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases Escalated</td>
<td>The number of escalated cases</td>
<td>\text{COUNT (Id) FROM Case WHERE OwnerId = \text{Current User AND IsEscalated = True}}</td>
</tr>
<tr>
<td></td>
<td>assigned to the agent.</td>
<td></td>
</tr>
<tr>
<td>Open Cases</td>
<td>The number of open cases</td>
<td>\text{COUNT (Id) FROM Case WHERE OwnerId = \text{Current User AND IsClosed = False}}</td>
</tr>
<tr>
<td></td>
<td>assigned to the agent.</td>
<td></td>
</tr>
<tr>
<td>Open Claims</td>
<td>The number of open claims</td>
<td>\text{COUNT (Id) FROM Claim WHERE OwnerId = \text{Current User AND IsClosed = False}}</td>
</tr>
<tr>
<td></td>
<td>assigned to the agent.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Calculation</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Open Opportunities</td>
<td>The number of open opportunities assigned to the agent.</td>
<td>COUNT (Id) FROM Opportunity WHERE OwnerId = Current User AND IsClosed = False</td>
</tr>
<tr>
<td>Payment-Due Policies</td>
<td>The number of policies with payment due within the selected time period.</td>
<td>COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND PaymentDueDate = Selected Time Period AND IsActive = True</td>
</tr>
<tr>
<td>Policies About to Lapse</td>
<td>The number of policies with final renewal date within the selected time period.</td>
<td>COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND FinalRenewalDate = Selected Time Period AND IsActive = True</td>
</tr>
<tr>
<td>Policies Up for Renewal</td>
<td>The number of policies with renewal date within the selected time period.</td>
<td>COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (RenewalDate = Selected Time Period OR FinalRenewalDate = Selected Time Period) AND IsActive = True</td>
</tr>
<tr>
<td>Unread Leads</td>
<td>The number of leads assigned to the agent but not yet read by the agent.</td>
<td>COUNT (Id) FROM Lead WHERE OwnerId = Current User AND IsUnreadByOwner = True</td>
</tr>
</tbody>
</table>

**Considerations for Policies and Claims**

Review these points to better understand the information that appears on the Policy component.

- The policies that don’t have a policy type are grouped under the Others policy type.

---

**EDITIONS**

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.
By default, the Policy component shows only the policies that a user owns. If you select a participant role when adding the Policy component to your account record page, the list includes the policies in which the user is a participant. And, at the top of the list, you see the Show only owned policies option. Select this option to view only the policies that the user owns.

When you hover over the Open Claims KPI, the expanded lookup card shows a View All link only when three or more claims are open. The View All link opens the Claims list view. You can edit the compact layout for the Claim object to include more fields on the lookup card.

When you hover over the Up for Renewal KPI, the expanded lookup card shows a View All link only when three or more policies are up for renewal. The View All link opens the Insurance Policies list view. You can edit the compact layout for the Insurance Policy object to include more fields on the lookup card.

A KPI includes a record only when certain fields in that record are populated and they match the criteria specific to that KPI. For example, when calculating Premium Paid, a policy is counted only when it meets all these criteria:
- The policy is owned by the user whose records you are viewing.
- The policy is active (IsActive = True).

Use this table to learn how KPIs are calculated.

<table>
<thead>
<tr>
<th>KPI</th>
<th>Description</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Paid</td>
<td>The sum of the active policy premiums.</td>
<td>SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE NameInsuredId = Current Account AND IsActive = TRUE</td>
</tr>
<tr>
<td>Up for Renewal</td>
<td>The list of active policies that are pending renewal in the next 90 days.</td>
<td>Policies FROM InsurancePolicy WHERE NameInsuredId = Current Account AND IsActive = TRUE AND RenewalDate in next 90 days, ORDER BY RenewalDate</td>
</tr>
<tr>
<td>Open Claims</td>
<td>User’s open claims list.</td>
<td>Claims FROM Claim WHERE AccountId = Current Account AND IsClosed = FALSE, ORDER BY LastModifiedDate</td>
</tr>
<tr>
<td>Claims Paid</td>
<td>The sum of the approved and paid amount for all closed claims.</td>
<td>SUM (ApprovedAmount) FROM Claim WHERE AccountId = Current Account AND</td>
</tr>
</tbody>
</table>
### Considerations for Life Events and Business Milestones

Review these points to better understand the information that appears on the Life Events or Business Milestones component.

- When you convert a person account to a business account, you retain the associated life events. However, they don’t appear as business milestones; they are on the Related tab on the account record page.
- When you convert a business account to a person account, it deletes the associated business milestones.
- If you have marked a life event type or business milestone type unique, you can have only one event or milestone of that type, including the expired event or milestone.

### Enable Retail Banking Features

Get a 360-degree view of customers with Retail Banking, a Financial Services Cloud Lightning app. Bankers can also easily manage high-volume transactions on one screen with the Retail Banking Console. The information bankers need is supported with new objects, fields, and record types for loans, deposits, and more.

Follow these steps to enable Retail Banking features.

- **Create a Personal Banker Profile**
  Create a Personal Banker profile to define the permissions and field-level security settings for all personal banker users.

- **Enable Personal Banker Profile Permissions**
  Enable the permissions and field-level security setting for the Personal Banker profile.

- **Set Object Field Permissions for the Personal Banker Profile**
  New object fields provide for banker-specific data. Take these steps to ensure that the fields are visible to personal banker users.

- **Add the Retail Banking Field Sets**
  Using the Retail Banking field sets, you can customize the details displayed for various objects and record types. If you have not customized the field sets, add the Retail Banking field sets by installing the unmanaged package. However, if you have customized the field sets, add the Retail Banking field sets manually.

- **Assign Page Layouts to New Financial Account Record Types**
  The Financial Accounts object includes new record types, such as Checking Account and Auto Loan, to support banking needs. These record types have customized page layouts that optimally display information for each account type.

- **Update Lightning Page Layouts for the Banking Home Page and Retail Banking Console**
  Lightning pages designed to help personal bankers see their key data and tasks are included with Retail Banking. Follow these steps to set up these pages for various record types and the user’s home page.
Add Personal Banker Users

Add Personal Banker users and assign them the Personal Banker profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

Create a Personal Banker Profile

Create a Personal Banker profile to define the permissions and field-level security settings for all personal banker users.

Start by cloning the Standard User profile.

Note: To set up profiles for other bank employees, create profiles and modify the permissions to provide the appropriate level of access.

1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Clone the Standard User profile.
3. Give it a name, such as Personal Banker.
4. Save your changes.

Enable Personal Banker Profile Permissions

Enable the permissions and field-level security setting for the Personal Banker profile.

1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Select the Personal Banker profile, click Edit, and update the following:
   • Under Custom App Settings:
     – Enable the Retail Banking Console app and set it as the default.
   • Under Tab Settings, Custom Tab Settings:
     – Education: Default Off
     – Employment: Default Off
     – Financial holdings: Default Off
     – Identification documents: Default Off
     – Securities: Default Off
   • Under Administrative Permissions:
     – Enable View Dashboards in Public Folders
     – Enable View Reports in Public Folders
   • Under General User Permissions:
     – Enable: Manage Leads
     – Enable: Report Builder
     – Enable: Transfer Leads
     – Enable: View My Team’s Dashboards
3. Save your changes.
4. Under Field-Level Security, select View next to Task. Edit the task and enable read access for the Type field. Save your changes and go back to the profile.

5. Under Record Type Settings, verify the following:
   - Contact defaults to Individuals.
   - Events includes Advisor Event and defaults to Advisor Event.
   - Leads includes Referral and defaults to Referral.
   - Billing Statements includes Credit and Debit and defaults to Credit.
   - Financial Account Types include Auto Loan, Checking Account, Credit Card, HELOC, Loan Account, Mortgage, Savings Account, and General Account, and defaults to Checking Account.
   - Opportunities defaults to General.
   - Tasks includes Advisor Task and defaults to Advisor Task.

Set Object Field Permissions for the Personal Banker Profile

New object fields provide for banker-specific data. Take these steps to ensure that the fields are visible to personal banker users.

1. From Setup, enter Profiles in Quick Find, then select Profiles.
2. Click the Personal Banker profile name.
4. For each of the Objects in the table below, click View.
5. Click Edit.
6. Set the Read Access and Edit Access flags for the fields as indicated in the table below.
7. Save your changes.

<table>
<thead>
<tr>
<th>Object</th>
<th>Field Name</th>
<th>Read Access</th>
<th>Edit Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>External Referrer</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Account</td>
<td>Individual Type</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Internal Referrer</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Account</td>
<td>Last Transaction Date</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Last Transaction Date - Joint Owner</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Last Transaction Date - Primary Owner</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Number of Fin. Accounts - Joint Owner</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Number of Fin. Accounts - Primary Owner</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Total Number of Financial Accounts</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>
Add the Retail Banking Field Sets

Using the Retail Banking field sets, you can customize the details displayed for various objects and record types. If you have not customized the field sets, add the Retail Banking field sets by installing the unmanaged package. However, if you have customized the field sets, add the Retail Banking field sets manually.

**Note:** If you’ve made just a few customizations to your field sets, we recommend that you make a note of these customizations, install the unmanaged package, and then reapply the customizations.

**Reinstall the Unmanaged Package**

To add the Retail Banking field sets, first remove the unmanaged package from your installation and then install the latest unmanaged package.

**Set Up Retail Banking Field Sets**

Where you have heavily customized the field sets in your implementation you may find it easier to add the Retail Banking field sets, rather than install the unmanaged package and reapplying your customizations.

### Table: Retail Banking Field Sets

<table>
<thead>
<tr>
<th>Object</th>
<th>Field Name</th>
<th>Read Access</th>
<th>Edit Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Total Outstanding Credit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Total Outstanding Credit - Joint Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Total Outstanding Credit - Primary Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Total Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Customer Timezone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Email Verified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>External Referrer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Internal Referrer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Marketing Opt-Out</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Referrer Score</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Financial Services Cloud is available in Lightning Experience. Available in: Professional, Enterprise, and Unlimited editions.
Reinstall the Unmanaged Package

To add the Retail Banking field sets, first remove the unmanaged package from your installation and then install the latest unmanaged package.

Note: If you’ve made just a few customizations to your field sets, we recommend that you make a note of these customizations, install the unmanaged package, and then reapply the customizations.

Install the unmanaged package as follows:

1. To remove the unmanaged package:
   a. From Setup, enter Installed in Quick Find, then select Installed Packages.
   b. Next to the Financial Services Cloud unmanaged package, click Uninstall.
   c. Select Yes, I want to uninstall and click Uninstall.

2. To install the unmanaged package:
   a. Locate the link to the Financial Services Cloud unmanaged package in the Product Specific Terms section of your order form.
   b. Copy the URL for the unmanaged package into your browser navigation bar and press Enter.
   c. Enter the password you received from Salesforce.
   d. Select Install for Specific Profiles...
   e. Scroll down to the Personal Banker profile. Set the Access Level to Full Access. This step maps the cloned profile that you created to the Personal Banker profile provided in the package.
   f. Select Install.
      If it takes a while, you can select Done and move on to do something else while the installation finishes. Check your email for confirmation that the installation was successful.
   g. Verify the installation of the unmanaged package.
      a. From Setup, enter Installed Packages in Quick Find, then select Installed Packages.
      b. Look for Financial Services Ext.

Set Up Retail Banking Field Sets

Where you have heavily customized the field sets in your implementation you may find it easier to add the Retail Banking field sets, rather than install the unmanaged package and reapplying your customizations.

Following the instructions in Creating and Editing Field Sets, add the following Retail Banking field sets:

- On Account, create this field set with the following properties:

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is it used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Accounts Summary</td>
<td>FSC_Banker_Profile_Fin_Acct_Summary</td>
<td>Personal Banker profile's Financials tab</td>
</tr>
</tbody>
</table>

with these fields:

<table>
<thead>
<tr>
<th>Label</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Bank Deposits</td>
<td>TotalBankDeposits</td>
</tr>
</tbody>
</table>
Customize Your Implementation

<table>
<thead>
<tr>
<th>Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Outstanding Credit</td>
<td>TotalOutstandingCredit</td>
<td></td>
</tr>
<tr>
<td>Total Number of Financial Accounts</td>
<td>TotalNumberOfFinAccounts</td>
<td></td>
</tr>
</tbody>
</table>

- On Financial Account create the following field sets:

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Loan Account</td>
<td>FSC_Client_AutoLoan</td>
<td>Client profile’s Financials tab</td>
</tr>
<tr>
<td>Checking Account</td>
<td>FSC_Client_CreditCard</td>
<td>Client profile’s Financials tab</td>
</tr>
<tr>
<td>Savings Account</td>
<td>FSC_Client_SavingsAccount</td>
<td>Client profile’s Financials tab</td>
</tr>
<tr>
<td>Loan Account</td>
<td>FSC_Client_LoanAccount</td>
<td>Client profile’s Financials tab</td>
</tr>
<tr>
<td>Mortgage Account</td>
<td>FSC_Client_MortgageAccount</td>
<td>Client profile’s Financials tab</td>
</tr>
<tr>
<td>HELOC Account</td>
<td>FSC_Client_HELOC</td>
<td>Client profile’s Financials tab</td>
</tr>
</tbody>
</table>

with these fields:

<table>
<thead>
<tr>
<th>Label</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Account Name</td>
<td>Name</td>
</tr>
<tr>
<td>Type</td>
<td>FinancialAccountType</td>
</tr>
<tr>
<td>Owner Type</td>
<td>OwnerType</td>
</tr>
<tr>
<td>Date Opened</td>
<td>OpenDate</td>
</tr>
<tr>
<td>Balance</td>
<td>Balance</td>
</tr>
</tbody>
</table>

and these field sets:

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Loan Account</td>
<td>FSC_Group_AutoLoan</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>Checking Account</td>
<td>FSC_Group_CheckingAccount</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>Credit Card Account</td>
<td>FSC_Group_CreditCard</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>Savings Account</td>
<td>FSC_Group_SavingsAccount</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>Loan Account</td>
<td>FSC_Group_LoanAccount</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>Mortgage Account</td>
<td>FSC_Group_MortgageAccount</td>
<td>Household profile’s Financials tab</td>
</tr>
<tr>
<td>HELOC Account</td>
<td>FSC_Group_HELOC</td>
<td>Household profile’s Financials tab</td>
</tr>
</tbody>
</table>

with these fields:
On Lead create the following field set:

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>LBL.Label_Field_Set_Referral_Form</td>
<td>FSC_Referral_Form</td>
<td>Used in global referral form</td>
</tr>
</tbody>
</table>

with these fields:

<table>
<thead>
<tr>
<th>Label</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>FirstName</td>
</tr>
<tr>
<td>Last Name</td>
<td>LastName</td>
</tr>
<tr>
<td>Expressed Interest</td>
<td>ExpressedInterest</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td>Street</td>
<td>Street</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>State</td>
<td>State</td>
</tr>
<tr>
<td>Postal Code</td>
<td>PostalCode</td>
</tr>
</tbody>
</table>

And:

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>LBL.Label_Field_Set_Referrals_Made</td>
<td>FSC_Referrals_Made_Community</td>
<td>Client profile's Referrals tab</td>
</tr>
</tbody>
</table>

with these fields:

<table>
<thead>
<tr>
<th>Label</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Expressed Interest</td>
<td>ExpressedInterest</td>
</tr>
<tr>
<td>Created Date</td>
<td>CreatedDate</td>
</tr>
</tbody>
</table>
Assign Page Layouts to New Financial Account Record Types

The Financial Accounts object includes new record types, such as Checking Account and Auto Loan, to support banking needs. These record types have customized page layouts that optimally display information for each account type.

Follow these steps to assign the custom pages to record types.

1. From Setup, open **Object Manager**.
2. Open the Object as indicated in the table below and then click **Record Types**.
3. Click **Page Layout Assignment** and then **Edit Assignment**.
4. For the record type indicated in the table, select the cell for the personal banker profile or the record type column, where assigning the layout to all profiles, and assign the page layout defined in the table.
5. Save your changes.

<table>
<thead>
<tr>
<th>Object</th>
<th>Record Type</th>
<th>Layout</th>
<th>Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Individual</td>
<td>Account (Retail Client - Individual) Layout</td>
<td>Personal Banker</td>
</tr>
<tr>
<td>Billing Statement</td>
<td>Debit</td>
<td>Debit Billing Statement Layout</td>
<td>All</td>
</tr>
<tr>
<td>Contact</td>
<td>Individual</td>
<td>Contact (Retail Client - Individual) Layout</td>
<td>Personal Banker</td>
</tr>
<tr>
<td>Lead</td>
<td>General</td>
<td>Lead (General) Layout</td>
<td>All</td>
</tr>
<tr>
<td>Lead</td>
<td>Retirement Planning</td>
<td>Lead (General) Layout</td>
<td>All</td>
</tr>
<tr>
<td>Opportunity</td>
<td>General</td>
<td>Opportunity (General) Layout</td>
<td>All</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Wallet Share Opportunity</td>
<td>Opportunity (Wallet Share) Layout</td>
<td>Personal Banker</td>
</tr>
</tbody>
</table>

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions.

Assign Page Layouts to New Financial Account Record Types

<table>
<thead>
<tr>
<th>Field Set Label</th>
<th>Name</th>
<th>Where is this used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>LBL.Label_Field_Set_Referrals_Made</td>
<td>FSC_Referrals_Made</td>
<td>Client profile's Referrals tab</td>
</tr>
</tbody>
</table>

with these fields:

<table>
<thead>
<tr>
<th>Related Object</th>
<th>Label</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Lead</td>
<td>Expressed Interest</td>
<td>Expressed Interest</td>
</tr>
<tr>
<td>Lead</td>
<td>Status</td>
<td>Status</td>
</tr>
<tr>
<td>Converted Opportunity ID</td>
<td>Opportunity Name</td>
<td>Name</td>
</tr>
</tbody>
</table>
Update Lightning Page Layouts for the Banking Home Page and Retail Banking Console

Lightning pages designed to help personal bankers see their key data and tasks are included with Retail Banking. Follow these steps to set up these pages for various record types and the user’s home page.

Assign Lightning Pages to Display Financial Services Cloud Data
You can assign different Lightning pages to the various Financial Services Cloud apps to display specific account record types. You can also choose which profiles can access the page. The two-column page layout is ideal for the Retail Banking app, the one-column layout is best suited to the Retail Banking Console, and the three-column suits both apps.

Assign the Banking Home Page Layout to a Profile
The Banking home page is tailored to the needs of personal bankers.

Assign Lightning Pages to Display Financial Services Cloud Data
You can assign different Lightning pages to the various Financial Services Cloud apps to display specific account record types. You can also choose which profiles can access the page. The two-column page layout is ideal for the Retail Banking app, the one-column layout is best suited to the Retail Banking Console, and the three-column suits both apps.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Click View next to the Lightning Page you want to assign, as shown in the table.
3. Click Activation.
4. Click the App, Record Type, and Profile tab.
5. Click Assign to Apps, Record Types, and Profiles.
6. Select the apps, and click Next.
7. Select the record type, and click Next.
8. Select the profiles, and click Next.
9. Review and save your assignments.

<table>
<thead>
<tr>
<th>Lightning Page Name</th>
<th>App</th>
<th>Record Type</th>
<th>Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Record Page</td>
<td>Wealth Management</td>
<td>Individual</td>
<td>Advisor, System Admin</td>
</tr>
<tr>
<td>Client Record Page</td>
<td>Wealth Management</td>
<td>Household</td>
<td>Advisor, System Admin</td>
</tr>
<tr>
<td>Banking Business Account Page</td>
<td>Retail Banking, Retail Banking Console</td>
<td>Business</td>
<td>Advisor, Personal Banker, System Admin</td>
</tr>
<tr>
<td>Banking Business Contact Page</td>
<td>Retail Banking, Retail Banking Console</td>
<td>Business</td>
<td>Advisor, Personal Banker, System Admin</td>
</tr>
</tbody>
</table>
Assign the Banking Home Page Layout to a Profile

The Banking home page is tailored to the needs of personal bankers. Assign this home page to the Personal Banker profile by following these steps.

1. From Setup, enter Lightning App Builder in Quick Find, then select Lightning App Builder.
2. Click View for Banking Home.
3. Click Activation.
4. Select Assign this Home page to specific profiles and click Next.
5. Select Personal Banker from the list of profiles and click Next.
6. Activate your changes.

Add Personal Banker Users

Add Personal Banker users and assign them the Personal Banker profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

1. From Setup, enter Users in Quick Find, then select Users.
2. Click New User. Enter the user’s details and assign them the Salesforce user license and then the Personal Banker profile.
3. Save your changes.
4. Under Permission Set Assignments, click Edit Assignments.
5. Under Available Permission Sets, add the Financial Services Cloud Standard and Personal Banker Access permission sets to Enabled Permission Sets.
6. Save your changes.

You can use subsets of the Retail Banking features for other users, such as tellers.
Enable Commercial Banking Features

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

Follow these steps to enable Commercial Banking features.

Enable Relationship Manager and Lending Assistant Permissions

Use permission sets to give your users access to the Commercial Banking Console Lightning app.

Assign Page Layouts to New Treasury Service Record Type

The Financial Account object includes the new Treasury Service record type to support commercial banking needs. This record type has a customized page layout that provides an optimal display of the record type information. This customized page layout is available to the Relationship Manager by default and can be added to other profiles as needed.

Assign the Commercial Banking Home Page to a Relationship Manager

Financial Services Cloud includes the Commercial Banking Home Page, which shows relationship managers the details they need.

Enable the Related Business Referrals List

Help relationship managers and lending assistants better manage their referrals by giving them the ability to identify related referrals.

Install the Commercial Banking Unmanaged Extension Package

Streamline the working day for relationship managers and lending assistants by providing them with the My Loans and Mortgages report and the Relationship Management Dashboard.

Add Commercial Banker Users

Add Commercial Banker users and assign them the Relationship Manager profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

Use New Custom Record Types for Referrals

A new custom metadata type enables you to work with new referral record types, similar to the business referrals delivered with Commercial Banking.

New Commercial Banking Fields

New fields provide for storing Commercial Banking specific data.

Enable Relationship Manager and Lending Assistant Permissions

Use permission sets to give your users access to the Commercial Banking Console Lightning app.

1. From Setup, enter Users in Quick Find, then select Users.
2. Click a user’s name.
3. Under Permission Set Assignments, click Edit Assignments.
4. Add the Relationship Manager or Lending Assistant permission set as appropriate to the user.
5. Save your changes.

To update user details in bulk, see Tip Sheet: Manage Bulk Permission Set License (PSL) Assignments for Financial Services Cloud
Assign Page Layouts to New Treasury Service Record Type

The Financial Account object includes the new Treasury Service record type to support commercial banking needs. This record type has a customized page layout that provides an optimal display of the record type information. This customized page layout is available to the Relationship Manager by default and can be added to other profiles as needed.

Follow these steps to assign the custom page to other profiles.

1. From Setup, open Object Manager.
2. Open Financial Account and then click Record Types.
3. Click Page Layout Assignment and then Edit Assignment.
4. For the Treasury Service record type, select the cell for the profile to which the page layout is to be added.
6. Save your changes.

Assign the Commercial Banking Home Page to a Relationship Manager

Financial Services Cloud includes the Commercial Banking Home Page, which shows relationship managers the details they need.

New releases of Financial Services Cloud upgrade the Lightning home pages and overwrite any changes. To add or remove Lightning components from these home pages, click Clone next to the page you want to modify in Lightning App Builder.

1. From Setup, enter Lightning App Builder in Quick Find, then select Lightning App Builder.
2. Click View for Commercial Banking Home Page.
3. Click Activation.
4. Select Assign this Home page to specific profiles and click Next.
5. Select Relationship Manager from the list of profiles and click Next.
6. Activate your changes.

Enable the Related Business Referrals List

Help relationship managers and lending assistant better manage their referrals by giving them the ability to identify related referrals.

1. From Setup, open Object Manager and click Account.
2. Open Page Layouts and click Account (Business Referral) Layout.
3. In the sections list, click Related Lists.
4. Drag Related Leads to the Related Lists section.
5. Save your changes.
Install the Commercial Banking Unmanaged Extension Package

Streamline the working day for relationship managers and lending assistants by providing them with the My Loans and Mortgages report and the Relationship Management Dashboard.

1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Commercial Banking Ext unmanaged package.
2. Paste the URL into your browser navigation bar and press Enter.
3. If you received a password from Salesforce, enter it.
4. Select Install for Specific Profiles.
5. Scroll to the Select Specific Profiles section, and map the Relationship Manager and Lending Assistant profiles to the package profiles and set the access level to Full Access.
6. Click Install.

If the installation takes a while, you can click Done and the installation completes in the background. Check your email for confirmation that the installation was successful.

If the package installation fails, see Why did my installation or upgrade fail?

Add Commercial Banker Users

Add Commercial Banker users and assign them the Relationship Manager profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

1. From Setup, enter Users in Quick Find, then select Users.
2. Click New User. Enter the user’s details and assign them the Salesforce user license and then the Relationship Manager profile.
3. Save your changes.
4. Under Permission Set Assignments, click Edit Assignments.
5. Under Available Permission Sets, add the Financial Services Cloud Standard and Relationship Manager Access permission sets to Enabled Permission Sets.
6. Save your changes.

You can use subsets of the Commercial Banking features for other users, such as lending assistance. See the Financial Services Cloud Administrator Guide for details on how to set up these users.

Use New Custom Record Types for Referrals

A new custom metadata type enables you to work with new referral record types, similar to the business referrals delivered with Commercial Banking.

Create and Configure Custom Record Types for Referrals
First create a custom record type on leads, based on the referral record type. Configure the record type mapping for the custom referral record type, then assign the record type to the user profiles that need them.
Add the Referral Component to Lightning Pages

You can add the referral component to Lightning pages to enable users to create specific referral record types. You can add multiple versions of the component to enable various referral record types to be created from a page.

Show the Referrer Score Field to Community Users

Provide community users with the permissions they needed for the Referrer Score field to display in the Referral Made Summary.

Create and Configure Custom Record Types for Referrals

First create a custom record type on leads, based on the referral record type. Configure the record type mapping for the custom referral record type, then assign the record type to the user profiles that need them.

1. From Setup, open Object Manager and locate Lead.
2. Open Record Types and click New.
3. In Existing Record Type, select Referral. Give the record type a label and add a description. In Lead Process select Lead Process and set the record type as active. Also, select the profiles to which the record type is available.
4. Save your changes.
5. From Setup, enter metadata in Quick Find, then select Custom Metadata Types.
6. Click Referral Record Type Mapper and Manage Referral Record Type Mappers.
7. Click New.
8. Complete the following information for the record type mapper:
   a. Enter a label.
   b. Don’t change the automatically set name.
   c. Enter the API name of the Referral Record Type you added in step 3.
   d. Enter your org’s namespace.
9. Save your changes.

The custom record type is now available to users with the assigned profiles when a lead or referral is created.

Add the Referral Component to Lightning Pages

You can add the referral component to Lightning pages to enable users to create specific referral record types. You can add multiple versions of the component to enable various referral record types to be created from a page.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Click Clone next to the Lightning Page you want to add the referral component to.
3. In the Search components box, enter Referrals Create Form.
4. Locate the Referrals Create Form component and drag it to an appropriate position on the page.
5. In Referral Record Type, select a referral record type.
6. As needed, repeat steps 3 through 5 to add a component for another referral record type.
7. Save your changes.
8. For the profiles that use the cloned page, activate the cloned page.

Show the Referrer Score Field to Community Users

Provide community users with the permissions they needed for the Referrer Score field to display in the Referral Made Summary.

Profiles that provide community access for users include:
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User

1. From Setup, enter Profile in the Quick Find box, and then select Profile.
2. Click the name of the community user profile you want to update.
3. In Field-Level Security, click View next to User.
4. Click Edit.
5. Select Read Access for the Referrer Score field.
6. Save your changes and return to the profile.
7. In Field-Level Security, click View next to Contact.
8. Click Edit.
9. Select Read Access for the Referrer Score field.
10. Save your changes.

New Commercial Banking Fields

New fields provide for storing Commercial Banking specific data.

<table>
<thead>
<tr>
<th>Object</th>
<th>Record type</th>
<th>Field</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Business</td>
<td>NaicsDesc</td>
<td>North American Industry Classification System (NAICS) description.</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Treasury Service</td>
<td>HardwareSerial__c</td>
<td>The serial number of hardware associated with the account.</td>
</tr>
<tr>
<td>Object</td>
<td>Record type</td>
<td>Field</td>
<td>Purpose</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------</td>
<td>------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Checking</td>
<td>OverdraftProtection__c</td>
<td>Customer accepts overdraft protection and its associated fees.</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Treasury Service</td>
<td>IncomingVolume__c</td>
<td>The volume of transactions coming in through the service.</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Treasury Service</td>
<td>OutgoingVolume__c</td>
<td>The volume of transactions going out through the service.</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Treasury Service</td>
<td>ServiceType__c</td>
<td>The type of service undertaken.</td>
</tr>
<tr>
<td>Financial Account</td>
<td>Treasury Service</td>
<td>TargetLimit__c</td>
<td>The limit on items or value that the service will process.</td>
</tr>
</tbody>
</table>

### Rollups in Financial Services Cloud

Financial Services Cloud supports rollup by lookup (RBL) summary rules and record rollups at the client and group levels. An RBL rule displays summary calculations of financial account information, such as account balances. A record rollup displays associated records for Financial Accounts, Financial Goals, Assets & Liabilities, Events, Tasks, Referrals, Insurance Policies, Claims, and Opportunities.

#### Rollup by Lookup Rules
When you edit a financial account record or primary group membership, the rollup by lookup (RBL) configuration updates the corresponding RBL summaries at the client and group levels. RBL rules include the RBL configuration, which provides the rollup definition, and filter criteria.

#### Record Rollups
All related records are displayed at the client level by default. When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Household__c lookup field. As a result, these records are displayed at the group level on the corresponding components or related lists.

#### Rollup Operation Example
Here's an example of a rollup summary calculation.

#### Enable Rollups
Enable rollups to display financial summary calculations and record rollups at the client and group levels.

#### Force Rollup By Lookup Recalculations
You can recalculate the RBL rules for your organization from the UI or by using Apex code.

#### Temporarily Disable Rollups to Accelerate Data Loads
Before initiating insert or update operations, you can disable rollups to speed up data loading. You can control whether rollup-by-lookup rules or record rollups are queried and calculated for your org or for a specific profile or user.

#### Enable Opportunity Rollups
Enable opportunity rollups to show all Primary Group member opportunities on a related list at the group level. Users can quickly take action and win opportunities from the Primary Group view.
Rollup by Lookup Rules

When you edit a financial account record or primary group membership, the rollup by lookup (RBL) configuration updates the corresponding RBL summaries at the client and group levels. RBL rules include the RBL configuration, which provides the rollup definition, and filter criteria.


Changes to a single Financial Account or Account Contact Relationship membership record update RBL summaries in real time. Changes made via bulk operations or the Group Builder queue the updates.

Note: Financial Services Cloud RBL rules aren’t customizable.

Record Rollups

All related records are displayed at the client level by default. When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Household__c lookup field. As a result, these records are displayed at the group level on the corresponding components or related lists.

<table>
<thead>
<tr>
<th>Object</th>
<th>Where to View Group Record Rollups</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Goals</td>
<td>Financial Goal</td>
<td>Component</td>
</tr>
<tr>
<td>Assets and Liabilities</td>
<td>Assets and Liabilities</td>
<td>Component</td>
</tr>
<tr>
<td>Referrals</td>
<td>Referrals Expressed Interest List, Referrals Made List</td>
<td>Component</td>
</tr>
<tr>
<td>Events and Tasks</td>
<td>Activities</td>
<td>Related List</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Household Opportunities</td>
<td>Related List</td>
</tr>
<tr>
<td>Insurance Policy</td>
<td>Household Policies</td>
<td>Related List</td>
</tr>
<tr>
<td>Claim</td>
<td>Household Claims</td>
<td>Related List</td>
</tr>
</tbody>
</table>

Note: You can’t edit the Household__c lookup field.

Rollup Operation Example

Here’s an example of a rollup summary calculation.

Rachel Adams is the primary owner of an investment account, and the Adams Household is her primary group. When you activate rollups for Financial Accounts, the Household__c lookup field on Rachel’s investment account is stamped with the Adams Household. The active RBL rules for Total Financial Accounts Client Primary Owner and Total Financial Accounts Household are invoked. As a result, her investment account balance rolls up to the Total Financial Account balance for Rachel Adams and the Adams Household. Rachel’s investment account is displayed on the Investment Account component.
Enable Rollups

Enable rollups to display financial summary calculations and record rollups at the client and group levels.

Here’s an overview of enabling record rollups and rollup by lookup (RBL) rules.

<table>
<thead>
<tr>
<th>Level</th>
<th>Record Rollups</th>
<th>RBL Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>All related records are displayed at the client level by default.</td>
<td>Enable RBL rules for client-level summarizations.</td>
</tr>
</tbody>
</table>
| Group | Enable rollups for the following objects to display related records for all primary group members:  
- Assets & Liabilities  
- Events  
- Financial Accounts  
- Financial Goals  
- Opportunities  
- Referrals  
- Tasks  
- Insurance Policies  
- Claims | 1. Enable RBL rules for group-level summarizations.  
2. Enable rollups for Financial Account records to aggregate primary group members’ associated financial account information. |

Understand RBL Configurations

Access RBL rules through the Rollup by Lookup Configurations tab.

Active
- indicates a rule is active or inactive.

From Object
- indicates the object to perform rollups from.

Field to Rollup From
- indicates the field to aggregate.

From Record Type (optional)
- indicates a specific record type to roll up from.

Lookup Field
- (most important) indicates the record (client, group) to roll up to.

Rollup Operation
- indicates the type of operation, such as Sum.

To Object
- indicates the object to summarize into.

Field to Roll Up To
- indicates the field to summarize into.

Fields Triggering Update (Optional)
- fields on the source object that might trigger the update. When left blank, any edit will invoke rollup recalculation.

Where Clause (Optional)
- filter criteria clause.
Here is an example of the Rollup By Lookup Configuration modal:

Packaged RBL Configurations

Financial Services Cloud supports the following RBL configurations in your org.

Note: All financial account (FA) type rules have corresponding financial account role (FAR) type rules to support rollup summaries for multiple joint owners. You can enable either the FA or FAR version of the RBL rule, but not both. For example, you can enable RBLForFARForFinAcctsClientPrimaryOwner instead of RBLForFinAcctsClientPrimaryOwner.

Note: All group or household (HH) type rules support RBL summary calculations for the Primary Owner’s Primary Group only.

<table>
<thead>
<tr>
<th>Rule</th>
<th>Type Object</th>
<th>Description</th>
</tr>
</thead>
</table>

98
<table>
<thead>
<tr>
<th>Rollup Code</th>
<th>Rollup Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RBLForFinAcctsHHTotal</td>
<td>Financial Account</td>
<td>Group-level aggregation of all Financial Account balances.</td>
</tr>
<tr>
<td>RBLForInvestmentsHH</td>
<td>Financial Account</td>
<td>Group-level aggregation of all Financial Account balances with record type Investment Account.</td>
</tr>
<tr>
<td>RBLForInsuranceHH</td>
<td>Financial Account</td>
<td>Group-level aggregation of all Financial Accounts balances with record type Insurance Policy.</td>
</tr>
<tr>
<td>RBLforAUMHH</td>
<td>Financial Account</td>
<td>Group-level aggregation of all Financial Accounts balances with Managed set to True. Denotes assets under management.</td>
</tr>
<tr>
<td>RBLForFinAcctsHHHeldAway</td>
<td>Financial Account</td>
<td>Group-level aggregation of all Financial Accounts balances with Held Away set to True.</td>
</tr>
<tr>
<td>RBLForTotalOutstandingCreditBankerHH</td>
<td>Financial Account</td>
<td>Group-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, or AutoLoan.</td>
</tr>
<tr>
<td>RBLForFARForLastTransactionDateHH</td>
<td>Financial Account</td>
<td>Group-level summary of the Last Transaction Date for all associated Financial Accounts.</td>
</tr>
<tr>
<td>RBLForTotalNumberOfAccountsBankerHH</td>
<td>Financial Account</td>
<td>Group-level summary of the number of all associated Financial Accounts.</td>
</tr>
<tr>
<td>RBLForLiabilitiesHH</td>
<td>Assets and Liabilities</td>
<td>Group-level summary of all non-financial liabilities.</td>
</tr>
<tr>
<td>RBLForNonfinAssetsHH</td>
<td>Assets and Liabilities</td>
<td>Group-level summary of all non-financial assets.</td>
</tr>
<tr>
<td>RBLForTotalNumberOfPoliciesHH</td>
<td>Insurance Policy</td>
<td>Group-level summary of the number of active policies owned by the policyholder's primary household.</td>
</tr>
<tr>
<td>RBLForGWPHH</td>
<td>Insurance Policy</td>
<td>Group-level aggregation of total premium for active policies owned by the policyholder's primary household.</td>
</tr>
<tr>
<td>RBLForTotalNumberOfClaimHH</td>
<td>Claim</td>
<td>Group-level summary of the number of claims raised against policies owned by the policyholder's primary household.</td>
</tr>
</tbody>
</table>

**Note:** This rollup includes a claim only if the associated policy is active.
<table>
<thead>
<tr>
<th>Rollup Code</th>
<th>Rollup Alias</th>
<th>Rollup Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RBLForClaimPaidHH</td>
<td>HH Claim</td>
<td>Group-level aggregation of total amount paid for claims raised against policies owned by the policyholder’s primary household.</td>
<td></td>
</tr>
<tr>
<td>Note: This rollup includes the amount paid for a claim only if the associated policy is active.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFinAcctsClientPrimaryOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Account balances where Client is Primary Owner on the Financial Account.</td>
<td></td>
</tr>
<tr>
<td>RBLForFinAcctsClientJointOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Account balances where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
<td></td>
</tr>
<tr>
<td>RBLForInvestmentsClientPrimaryOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Investment Account where Client is Primary Owner on the Financial Account.</td>
<td></td>
</tr>
<tr>
<td>RBLForInvestmentsClientJointOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Investment Account where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
<td></td>
</tr>
<tr>
<td>RBLForBankingClientPrimaryOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is Primary Owner on the Financial Account.</td>
<td></td>
</tr>
<tr>
<td>RBLForBankingClientJointOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
<td></td>
</tr>
<tr>
<td>RBLForInsuranceClientPrimaryOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is Primary Owner on the Financial Account.</td>
<td></td>
</tr>
<tr>
<td>RBLForInsuranceClientJointOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
<td></td>
</tr>
<tr>
<td>RBLforAUMClientPrimaryOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with Managed set to True where Client is Primary Owner on the Financial Account. Denotes Assets under Management.</td>
<td></td>
</tr>
<tr>
<td>RBLforAUMClientJointOwner</td>
<td>FA Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with Managed set to True where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
<td></td>
</tr>
</tbody>
</table>
Owner on the Financial Account. One Joint Owner only.

<table>
<thead>
<tr>
<th>RBLForFinAcctsClientHeldAwayPrimaryOwner</th>
<th>FA</th>
<th>Financial Account</th>
<th>Client-level aggregation of all Financial Accounts with Held Away set to True where Client is Primary Owner on the Financial Account.</th>
</tr>
</thead>
<tbody>
<tr>
<td>RBLForFinAcctsClientHeldAwayJointOwner</td>
<td>FA</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with Held Away set to True where Client is Joint Owner on the Financial Account. One Joint Owner only.</td>
</tr>
<tr>
<td>RBLForFARForFinAcctsClientPrimaryOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts balances where Client is designated as the Primary Owner on Financial Account Role.</td>
</tr>
<tr>
<td>RBLForFARForFinAcctsClientJointOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts balances where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
</tr>
<tr>
<td>RBLForFARForInvestmentsClientPrimaryOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is designated as the Primary Owner on Financial Account Role.</td>
</tr>
<tr>
<td>RBLForFARForInvestmentsClientJointOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
</tr>
<tr>
<td>RBLForFARForTotalBankDepositsPrimaryOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Investment Account where Client is designated as the Primary Owner on Financial Account Role.</td>
</tr>
<tr>
<td>RBLForFARForTotalBankDepositsJointOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Investment Account where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
</tr>
<tr>
<td>RBLForFARForInsuranceClientPrimaryOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is designated as the Primary Owner on Financial Account Role.</td>
</tr>
<tr>
<td>RBLForFARForInsuranceClientJointOwner</td>
<td>FAR</td>
<td>Financial Account</td>
<td>Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
</tr>
<tr>
<td>Financial Account Role</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARforAUMClientPrimaryOwner</td>
<td>Client-level aggregation of all Financial Accounts with Managed set to True where Client is designated as the Primary Owner on Financial Account Role. Summary denotes Assets under Management.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARforAUMClientJointOwner</td>
<td>Client-level aggregation of all Financial Accounts with Managed set to True where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForFinAcctsClientHeldPrimaryOwner</td>
<td>Client-level aggregation of all Financial Accounts with Held Away set to True where Client is designated as the Primary Owner on Financial Account Role.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForFinAcctsClientHeldJointOwner</td>
<td>Client-level aggregation of all Financial Accounts with Held Away set to True where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForInsurancePremium</td>
<td>Client-level aggregation of all premiums for all Financial Accounts with record type Investment Account where Client is designated as the Related Account on Financial Account Role.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForTotalOutstandingCreditPrimaryOwner</td>
<td>Client-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, AutoLoan where Client is designated as a Primary Owner on Financial Account Role.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForTotalOutstandingCreditJointOwner</td>
<td>Client-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, AutoLoan where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForTotalNumberOfAccountsPrimaryOwner</td>
<td>Client-level summary of the number of all associated Financial Accounts where Client is designated as a Primary Owner on Financial Account Role.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForTotalNumberOfAccountsJointOwner</td>
<td>Client-level summary of the number of all associated Financial Accounts where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RBLForFARForLastTransactionDatePrimaryOwner</td>
<td>Client-level summary of the Last Transaction Date for all associated Financial Accounts where</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Client is designated as a Primary Owner on Financial Account Role.

<table>
<thead>
<tr>
<th>RBLForFARForLastTransactionDateJointOwner</th>
<th>Financial Account Role</th>
<th>Client-level summary of the Last Transaction Date for all associated Financial Accounts where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.</th>
</tr>
</thead>
<tbody>
<tr>
<td>RBLForFARForLastTransactionDateHH</td>
<td>Financial Account Role</td>
<td>Group-level summary of the Last Transaction Date for all associated Financial Accounts.</td>
</tr>
<tr>
<td>RBLForLiabilitiesClientPrimaryOwner</td>
<td>Assets and Liabilities</td>
<td>Client-level summary of all non-financial liabilities where Client is Primary Owner.</td>
</tr>
<tr>
<td>RBLForLiabilitiesClientJointOwner</td>
<td>Assets and Liabilities</td>
<td>Client-level summary of all non-financial liabilities where Client is Joint Owner.</td>
</tr>
<tr>
<td>RBLForNonfinAssetsClientPrimaryOwner</td>
<td>Assets and Liabilities</td>
<td>Client-level summary of all non-financial assets where Client is Primary Owner.</td>
</tr>
<tr>
<td>RBLForNonfinAssetsClientJointOwner</td>
<td>Assets and Liabilities</td>
<td>Client-level summary of all non-financial assets where Client is Joint Owner.</td>
</tr>
<tr>
<td>RBLForTotalRevenueBanker</td>
<td>Revenue</td>
<td>Client-level summary of all Revenues.</td>
</tr>
</tbody>
</table>

SEE ALSO:
What Is a Group?

**Force Rollup By Lookup Recalculations**

You can recalculate the RBL rules for your organization from the UI or by using Apex code.

**Note:** To recalculate rollup summaries for a small subset of data, either modify the underlying Financial Accounts or modify the Account Contact Relationship.

To recalculate the RBL summaries from the UI.

1. In App Launcher, click **Rollup By Lookup Configurations**.
2. Change the list view to **All**.
3. Click **List View Controls**.
4. Click **Select Fields to Display**.
5. Under Available Fields, select **Active**, and add the selected field to **Visible Fields**.
6. Save your changes.
7. Select RBL rule(s) to be re-calculated from the list view
   **Note:** Note: Activate RBL rules before you run them.
8. Click **Run Rules**.

To recalculate the RBL summaries using Apex code.
1. Call a global class with the global constructor RollupRecalculationBatchable through Apex code.

   **Note:** When running the RBL rules through Apex code, your list must not:
   - Be null or empty
   - Contain inactive, invalid, or duplicate RBL configuration IDs

2. Create a list of IDs of your active Rollup By Lookup Configuration objects in the order that you want them to run.

3. Create an instance of RollupRecalculationBatchable, and pass your list of IDs to it.

4. Execute the batch job with Database.executeBatch. After you execute this batch job, future rollups are automatically executed.

Here’s sample Apex code:

```apex
// Create your list of IDs
List<Id> rollupsToRun = new List<Id>();
List<FinServ__RollupByLookupConfig__c> queriedRollups = [SELECT Id FROM
   FinServ__RollupByLookupConfig__c WHERE FinServ__Active__c = true];
for (FinServ__RollupByLookupConfig__c rollup : queriedRollups) {
   rollupsToRun.add(rollup.Id);
}

// Create an instance of RollupRecalculationBatchable
FinServ.RollupRecalculationBatchable job = new
FinServ.RollupRecalculationBatchable(rollupsToRun);

// Run the rollups
Database.executeBatch(job);
```

SEE ALSO:
- Batch Apex

**Temporarily Disable Rollups to Accelerate Data Loads**

Before initiating insert or update operations, you can disable rollups to speed up data loading. You can control whether rollup-by-lookup rules or record rollups are queried and calculated for your org or for a specific profile or user.

**Important:** Enable rollups during Financial Account delete operations to ensure that rollups are correctly calculated and updated on the target records.

1. From Setup, enter *Custom Settings* in the Quick Find box, then select *Custom Settings*.

2. Next to Wealth Application Config, click *Manage*.

3. Click *Edit* to modify the Default Organization Level Value setting.

   **Note:** If a Default Organization Level isn’t defined, click *New* to define a new Default Organization Level Value.

4. Deselect *Enable Rollup Summary* and *Enable Group Record Rollup*.

   **Note:** You can temporarily disable the settings at your Default Organization Level Value, but enable them after completing the data load operation. You can also create or modify user- or profile-level settings in the Setup Owner related list below the Default Organization Level Value. For example, if you’re using an Integration User or profile for data loads with ETL tools, you can permanently disable the settings for the Integration User or profile using the Setup Owner related list.
5. Save your changes.


7. Select **Enable Rollup Summary** and **Enable Group Record Rollup**.
   This step is optional if you disabled the settings only for a user or profile.

8. Run **GroupAssignmentBatchable**.

   **Important:** If you deselect the **Enable Rollup Summary** setting, new and modified financial accounts are not displayed or
   modified on the Group and Household related lists. After you run a **GroupAssignmentBatchable** job, the household financial
   account related lists display the Financial Account records at the household level.

9. Run **RunRBLBatchable**.

10. Save your changes.

### Enable Opportunity Rollups

Enable opportunity rollups to show all Primary Group member opportunities on a related list at the group level. Users can quickly take
action and win opportunities from the Primary Group view.

Add Opportunities as a picklist value to the Rollup__c field on Account Contact Relationship.

1. From Setup, open **Object Manager** and click **Account Contact Relationship**.

2. Open **Fields & Relationships** and click **Roll-Ups**.

3. In the Values section, click **New**.

4. Enter **Opportunities** in the Roll-Ups field.

5. Save your changes.

### Set Up Intelligent Need-Based Referrals and Scoring

Intelligent Need-Based Referrals and Scoring is a referral management workflow that helps source
referrals internally and externally across lines of business. Users create and automatically route
referrals based on a customer's expressed interest, from savings accounts to home loans. Build
processes to create automatic email notifications that keep users up-to-date. The dashboards and
reports make it a snap to identify and reward top referrers.

**Install Intelligent Need-Based Referrals and Scoring**
Install the unmanaged extension package for Intelligent Need-Based Referrals and Scoring
(Financial Services Referral Ext) to provide access to referral dashboards and reports. The
dashboards help users strengthen their referral networks, nurture relationships, and identify
and reward top referrers.

**Enable the Referrer Score**
A referrer score, from 0 to 100, represents the conversion rate for an individual referrer. You can use the score to identify and reward top referrers.

**Referral Approval Process**
A referral approval process is an automated process that you can use to approve referrals in Financial Services Cloud. You can specify
the steps necessary for a referral to be approved and who must approve it at each step.
Create a Process
Optionally, use a process to initiate the referral approval process and to generate emails when people create, update, or reassign referrals.

Update the Leads Tab Name
Change the Leads tab name to Leads & Referrals. Changing the tab name changes Lead score to Lead & Referral score.

Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring
If there isn’t an option to add referrals to rollups, enable referral rollups so users can see all the referrals for members of a group.

Components That Track Intelligent Need-Based Referrals and Scoring
Help users stay on top of their referral activity with these custom components.

Install Intelligent Need-Based Referrals and Scoring
Install the unmanaged extension package for Intelligent Need-Based Referrals and Scoring (Financial Services Referral Ext) to provide access to referral dashboards and reports. The dashboards help users strengthen their referral networks, nurture relationships, and identify and reward top referrers.

Note: The package includes two dynamic dashboards. To install the package, your org must be under your Salesforce reports and dashboards limit. To extend your limit, contact Salesforce.

1. Copy

http://industries.force.com/financialservicescloudextensionrb into your browser and press Enter.

2. If you received a password from Salesforce, enter it.

3. Select Install for Specific Profiles.

4. Scroll to the Advisor profile, and set the Access Level to Full Access. This step maps the cloned profile that you created as a pre-installation task to the Advisor profile provided in the package.

5. Repeat for the Personal Banker, Relationship Manager, and any other relevant profiles.

6. Select Install.

If the installation takes a while, you can click Done and the installation completes in the background. Check your email for confirmation that the installation was successful.

If the package installation fails, see Why did my installation or upgrade fail?

SEE ALSO:
Dashboard Limits, Limitations, and Allocations
Enable the Referrer Score

A referrer score, from 0 to 100, represents the conversion rate for an individual referrer. You can use the score to identify and reward top referrers.

1. From Setup, enter Custom Settings in the Quick Find box, and then select Custom Settings.
2. Select Manage next to Wealth Application Config.
3. Click New.
4. Select Enable Referrer Score.
5. Save your changes.

Referral Approval Process

A referral approval process is an automated process that you can use to approve referrals in Financial Services Cloud. You can specify the steps necessary for a referral to be approved and who must approve it at each step.

Create a Lead Queue for Referral Approvers
Use a Lead Queue to provide approvers with easy access to the referrals requiring approval.

Create an Approval Process
Use an Approval Process to automate the way referrals are approved.

SEE ALSO:
Set Up an Approval Process

Create a Lead Queue for Referral Approvers

Use a Lead Queue to provide approvers with easy access to the referrals requiring approval.

1. From Setup, enter Queues in the Quick Find box, and then select Queues.
2. Click New.
3. For Label, enter Referral Approvers.
4. Accept the unique name.
5. Add the Lead object to Selected Objects.
6. Save your changes.
Create an Approval Process

Use an Approval Process to automate the way referrals are approved.

Before starting this step, create email templates for referral assignment notification and referral update notification emails. For details on how to create email templates, see the Email Templates in Lightning Experience help article.

1. From Setup, enter Approval Processes in the Quick Find box, and then select Approval Processes.
2. For Manage Approval Processes For, select Lead.
4. For Name, enter Referral Approval Process.
5. Accept the unique name.
6. For Approval Assignment Email Template, enter the name of the referral assignment notification email template you created.
7. For Select Approve, select Automatically assign to queue.
8. Select the Referral Approvers queue.
9. Save your changes.
11. Under Final Approval Actions:
   a. Click Add New | Email Alert.
   b. For Description, enter Approval Alert Email.
   c. Accept the unique name.
   d. For Email Template, enter the name of the referral update notification email template you created.
   e. In Recipient Type search select User, and then click Find.
   f. Add the recipients.
   g. Save your changes.
   h. Click Add New | Field Update to change the owner to Referral Approvals queue.
   i. For Name, enter Approved Referral Owner.
   j. Accept the unique name.
   k. Choose the field to update.
   l. Save your changes.
12. Under Final Rejection Actions:
   a. Click Add New | Field Update.
   b. For Name, enter Rejection Action.
   c. Accept the unique name.
   d. For Field To Update, choose Lead Status.
   e. For Picklist Options, select A specific value and choose Closed - Not Converted.
f. Save your changes.

SEE ALSO:
Email Templates in Lightning Experience

Create a Process

Optionally, use a process to initiate the referral approval process and to generate emails when people create, update, or reassign referrals.

From Process Builder, create a process that meets your org’s business requirements.

SEE ALSO:
Lightning Process Builder
Create a Process with Process Builder

Update the Leads Tab Name

Change the Leads tab name to *Leads & Referrals*. Changing the tab name changes Lead score to Lead & Referral score.

Note: Changing the Leads tab name affects all users, even if they’re not using Intelligent Need-Based Referrals and Scoring.

SEE ALSO:
Rename Object, Tab, and Field Labels

Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring

If there isn’t an option to add referrals to rollups, enable referral rollups so users can see all the referrals for members of a group.

Follow these steps to add the picklist value to enable referral rollups.

1. From Setup, click *Object Manager*, 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.
Components That Track Intelligent Need-Based Referrals and Scoring

Help users stay on top of their referral activity with these custom components.

- **My Top Referrers (Component name: Referrals Top Referrers - Financial Services Cloud)**—Displays ranked list of individuals who’ve made referrals.
- **Referrals Assigned to Me (#) (Component name: Referrals Assigned List - Financial Services Cloud)**—Displays referrals assigned to a user.
- **Referrals Assigned to Me (Component name: Referrals Assigned Summary - Financial Services Cloud)**—Displays summary of referrals assigned to a user.
- **New Referral (Component name: Referrals Create Form - Financial Services Cloud)**—Form for creating a referral.
- **Referrer Summary (Component name: Referrals Made Summary - Financial Services Cloud)**—Displays summary of referrals made by a user.
- **Referral Performance (Component name: Referrals Made Chart - Financial Services Cloud)**—Displays conversion rate of a user’s referrals.
- **Referrals Made (Component name: Referrals Made List - Financial Services Cloud)**—Displays status of a user’s referrals.
- **Expressed Interests (Component name: Referrals Expressed Interest List - Financial Services Cloud)**—Displays a referral’s interest, such as a checking account or a mortgage.

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.

Enable the Insurance Compact Layouts (Optional)

Enable the insurance compact layouts for the relevant record types.

1. From Setup, open *Object Manager* and click *Account*.
2. Open *Compact Layouts*. 

**EDITIONS**

Financial Services Cloud is available in Lightning Experience.

Available in: Professional, Enterprise, and Unlimited editions.
3. 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**.

4. 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`.

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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.

**Enable the Expressed Interests Component**

This component makes it easy to see all open referrals based on expressed interests on the client profile, and 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.

**Create a Field Set for the Expressed Interests Component**

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

1. From Setup, open *Object Manager* and click *Lead*.
2. Open *Field Sets* and 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.

   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. If you like, you can retitle it.
   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. From Setup, open Object Manager and click Lead.
   b. Open Page Layouts and click Lead (Referral) Layout.
   c. Click Edit.
   d. In the Quick Find box in the Page Layouts modal, enter Related Account.
   e. 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.

Synchronize the Next and Last Interactions on the Account Object

Schedule an Apex job to set up a batch job for next and last interaction calculations.

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 ContactInteractionSchedulable.
5. Select the batch job.
6. Enter today’s date as the start and end date.
7. Choose the start time. The batch job will now run every 15 minutes.
8. Save your changes.

Specify Custom Record Types for Synchronization

Specify custom record types to synchronize next and last interactions on Account.
1. From Setup, enter Custom Metadata Types in the Quick Find box, and then select Custom Metadata Types.
2. Click Manage Records next to InteractionFieldUpdate.
   - **Note:** By default, AdvisorEventRecordType and AdvisorTaskRecordType configurations are available. These records include AdvisorEvent and AdvisorTask record types for calculation in next and last interaction dates.
3. Click New.
4. Enter a label.
5. Specify the Object Name, such as Event.
6. Specify the Record Type Name, such as ClientAssociateEvent.
7. Save your changes.

Surveys in Financial Services Cloud

Get customer feedback fast with Salesforce Surveys in Financial Services Cloud. Use a simple editor to create forms for collecting customer data. You can add various question types, including a customer satisfaction score, to gather useful insights from your users and customers. Summarize and share customer feedback in reports and dashboards.

To create surveys, assign a Survey Creator permission set to a user and configure sharing settings for survey objects. To send surveys to your customers, create and enable a Salesforce community. Enable public access to the community and associate the community with Salesforce Surveys in setup.

Financial Services Cloud Communities

Empower partners and customers by providing access to Financial Services Cloud through Communities licenses for external users. Financial Services Cloud lets you give access to a client’s profile, including account details, financial accounts, and more, with Community Cloud. An advisor, client, or customer can access client account information in a community.

- **Note:** To set up Financial Services Cloud Communities, make sure that you have user licenses for Financial Services Cloud and Communities.

Configure a partner community, a customer community, or both, depending on your users’ needs.

If you configure a single community and provide access to partner and customer community users, create page variations for each user profile. Members of this community will use the same URL, but partner and community users will see different home pages, each tailored with the Financial Services Cloud components relevant to their needs.
Configure a Partner Community
The Financial Services Cloud managed package includes an Advisor Partner Community profile and permission set to let you expose account details and financial accounts information to your independent advisors. You can then create custom pages for your community with Community Builder so that independent advisors can access Financial Services Cloud information.

Create an Advisor Partner Community User Profile
Create a profile for independent advisors by cloning the Partner Community User profile. This cloned profile becomes the baseline that grants independent advisors access to Financial Services Cloud features.

Enable Advisor Partner Community Permissions
Enable required permissions and field-level security settings for the Advisor Partner Community User profile so independent advisors can access Financial Services Cloud features.

Create an Advisor Partner User
Configure a contact as an advisor partner user so that the contact can access the Financial Services Cloud community.

Set Up a Customer Community
Empower customers with Financial Services Cloud communities.

Configure a Customer Community
The Financial Services Cloud managed package includes Customer Community profiles and a permission set to let you expose account details and financial accounts information to community users. You can then create custom pages for your community, with Community Builder, so that community users can access Financial Services Cloud information.

Create a Customer Community User Profile
Create a profile for community users by cloning a community user profile. This cloned profile becomes the baseline that grants community users access to Financial Services Cloud features.

Enable Customer Community Permissions
Enable the Customer Community Read Only permission set to provide the permissions and field-level security settings that customer community users need to access Financial Services Cloud.

Create a Customer Community User
Create a Customer Community user and assign the required permissions to enable access to Financial Services Cloud Customer Communities.

Configure a Partner Community
The Financial Services Cloud managed package includes an Advisor Partner Community profile and permission set to let you expose account details and financial accounts information to your independent advisors. You can then create custom pages for your community with Community Builder so that independent advisors can access Financial Services Cloud information.

Before you begin, make sure that you have a community to configure for Financial Services Cloud. Follow these steps to activate the Advisor Partner Community profile and the relevant permission set.

1. From Setup, enter communities in the Quick Find box, then select All Communities.
2. Next to your community name, click Workspaces.
3. From Community Workspaces, click Administration and then click Members.
4. From Search, select Portal.
5. From the Available Profiles list, select one of the following based on your community user license:
   - Advisor Partner Community

EDITIONS
Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.

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For Partner Community user license

- **Advisor Partner Community Login**
  For Partner Community Login user license

- Your custom Partner Community profile

6. Click **Add**.

7. From the Available Permission Sets list, select **Advisor Partner Community** and then click **Add**.

8. Save your changes.

9. Click **Settings** and then click **Activate Community**.

### Create an Advisor Partner Community User Profile

Create a profile for independent advisors by cloning the Partner Community User profile. This cloned profile becomes the baseline that grants independent advisors access to Financial Services Cloud features.

1. From Setup, enter **Profiles** in Quick Find, then select **Profiles**.

2. Next to Partner Community User profile or Partner Community Login User profile click **Clone**.

   The user profile is based on your Communities user license.

3. Give it a name, such as **Advisor Partner Community User** or **Advisor Partner Community Login User**.

4. Save your changes.

### Enable Advisor Partner Community Permissions

Enable required permissions and field-level security settings for the Advisor Partner Community User profile so independent advisors can access Financial Services Cloud features.

Financial Services Cloud provides an Advisor Partner Community permission set. Make sure to assign both the Advisor Partner Community User profile and the Advisor Partner Community permission set to your independent advisors.

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

You can edit the Advisor Partner Community User profile because you created it. You can’t edit the Advisor Partner Community permission set. If you want to add permissions to the Advisor Partner Community permission set, create another permission set for the extra permissions. Keeping them separate helps ensure that future upgrades to the Advisor Partner Community permission set don’t affect your additions.

1. From Setup, enter **Profiles** in Quick Find, then select **Profiles**.

2. Click **Advisor Partner Community User** or **Advisor Partner Community Login User**.

3. Enable these permissions.
   - Import Leads
   - Manage Leads
   - Transfer Cases
   - Transfer Leads

4. Save your changes.
5. Set field permissions for the **Type** field in the Task object. Depending on which interface you’re using, do one of the following:

- **Permission sets or enhanced profile user interface**—In Find Settings..., enter *Task* and select *Tasks* from the list. Edit the task and enable Read and Edit for the **Type** field.
- **Original profile user interface**—In the Field-Level Security section, select *View* next to Task. Edit the task and enable Read and Edit for the **Type** field.

6. Verify the record type settings for these objects.

- Events include and default to *Advisor Event*
- Leads include General and Retirement Planning and defaults to *Retirement Planning*
- Opportunities include General, Retirement Planning, and Opportunity (Wallet Share) and defaults to *Opportunity (Wallet Share)*
- Tasks include and defaults to *Advisor Task*

---

### Create an Advisor Partner User

Configure a contact as an advisor partner user so that the contact can access the Financial Services Cloud community.

Before you can configure a contact as an advisor partner user, the owner of the contact record must have a role assigned.

<i>**Note:** Complete these steps in Salesforce Classic.</i>

1. **Assign a role to the owner of the contact record.**
   a. From Setup, enter *user* in Quick Find, then select *Users > Users*.
   b. Next to the owner of the contact record, click *Edit*.
   c. From the General Information section, select a role, such as CEO.
   d. Save your changes.

2. **Enable the contact and the contact’s related account as external partner users.**

   <i>**Note:** The contact must have a standard related account.</i>

   a. From the contact record page, click the account name in Related Accounts.
   b. Select *Manage External User > Enable Partner User*.
   c. From the New User page, in the General Information section, select the following:
      - User License—*Partner Community*
      - Profile—*Advisor Partner Community*
   d. Save your changes.

   e. From the contact record page, select *Manage External User > Enable Partner User*.
   f. From the New User page, in the General Information section, select the following:
      - User License—*Partner Community*
      - Profile—*Advisor Partner Community*
   g. Save your changes.
3. Assign a permission set.
   a. From the contact’s user page, click Permission Set Assignments and then click Edit Assignments.
   b. From Available Permission Sets, select Advisor Partner Community then click Add.
   c. Save your changes.
      If the community is activated, an email is sent to the advisor partner user with community access information.

Next, you can configure Financial Services Cloud Lightning components in your community with Community Builder.

SEE ALSO:
- Create Custom Pages with Community Builder
- How to Provision Salesforce Communities Users

Set Up a Customer Community
Empower customers with Financial Services Cloud communities.
To set up a customer community, create a new user and assign it a user profile, a permission set license, and the Customer Community Read Only permission set. The four out-of-the-box customer community profiles map to the customer community licenses: Client Customer Community, Client Customer Community Plus, Client Customer Community Login, and Client Customer Community Plus Login.

Configure a Customer Community
The Financial Services Cloud managed package includes Customer Community profiles and a permission set to let you expose account details and financial accounts information to community users. You can then create custom pages for your community, with Community Builder, so that community users can access Financial Services Cloud information.

Note: The Leads and Opportunities components aren’t available in Customer Community user licenses.

Before you begin, make sure that you have a community to configure for Financial Services Cloud. Follow these steps to activate Community profiles and the Customer Community Read Only permission set.

1. From Setup, enter communities in Quick Find, then select All Communities.
2. Next to your community name, click Workspaces.
3. From Community Workspaces, click Administration and then click Members.
4. From Search, select Portal.
5. From the Available Profiles list, select one of the following based on your community user license:
   - Client Customer Community
   - Client Customer Community Plus
   - Client Customer Community Login
   - Client Customer Community Plus Login
   For Customer Community user license:
   - Customer Community
   - Customer Community Plus
   For Customer Community Login user license:
- Customer Community Login
- Customer Community Plus Login

6. Click **Add**.
7. From the Available Permission Sets list, select **Customer Community Read Only** and then click **Add**.
8. Save your changes.
9. Click **Settings** and then click **Activate Community**.

**Create a Customer Community User Profile**

Create a profile for community users by cloning a community user profile. This cloned profile becomes the baseline that grants community users access to Financial Services Cloud features.

Follow these steps to clone a profile:
1. From Setup, enter **Profiles** in Quick Find, then select **Profiles**.
2. Next to the user profile that maps to your customer communities license, click **Clone**
3. Give it a name, such as **Banking Customer Community User**.
4. Save your changes

**Enable Customer Community Permissions**

Enable the Customer Community Read Only permission set to provide the permissions and field-level security settings that customer community users need to access Financial Services Cloud.

**Note:** Community Cloud is available for an extra cost in Enterprise and Unlimited Editions.

Follow these steps to enable the Customer Community Read Only permission set:
1. From Setup, enter **Manage Users** in Quick Find, then select **Users**.
2. Select a user name.
3. Select the **Permission Set Assignments** related list.
4. Click **Edit Assignments**.
5. Select **Customer Community Read Only** in Available Permission Sets and add it to Enabled Permission Sets.
6. Save your changes.

**Tip:** To assign permission sets to multiple users, from Setup, enter **Permission Sets** in Quick Find, then select **Permission Sets** and then select the relevant permission set. When you’re ready to assign the permission set to customer community users, select **Manage Assignments**.

**Note:** You can’t edit the Customer Community Read Only permission set. If you want to grant additional permissions, create a new permission set and use it with the Customer Community Read Only permission set; any future upgrades to the out-of-the-box permission set is applied. If you want to remove permissions, clone the Customer Community Read Only permission set and then make the required changes.
Create a Customer Community User

Create a Customer Community user and assign the required permissions to enable access to Financial Services Cloud Customer Communities.

Before you can create a customer community user, the owner of the contact record must have a role assigned.

ใจ Note:  Complete these steps in Salesforce Classic:

1. Assign a role to the owner of the contact record.
   a. From Setup, enter *User* in Quick Find, then select **Users > Users**.
   b. Next to the owner of the contact record, click **Edit**.
   c. From the General Information section, select a role, such as **CEO**.
   d. Save your changes.

2. Enable the contact and the contact’s related account as external partner users.
   ใจ Note: The contact must have a standard related account.
   a. From the contact record page, click the account name in Related Accounts.
   b. Select **Manage External User > Enable User**
   c. From the New User page, in the General Information section, select the following:
      User License
      • Client Customer Community
      • Client Customer Community Plus
      • Client Customer Community Login
      • Client Customer Community Plus Login
      Profile
      • Client Customer Community
      • Client Customer Community Plus
      • Client Customer Community Login
      • Client Customer Community Plus Login
   d. Save your changes.
   e. From the contact record page, select **Manage External User > Enable User**
   f. From the New User page, in the General Information section, select the following:
      User License
      • Client Customer Community
      • Client Customer Community Plus
      • Client Customer Community Login
      • Client Customer Community Plus Login
      Profile
      • Client Customer Community
      • Client Customer Community Plus
• Client Customer Community Login
• Client Customer Community Plus Login

g. Save your changes

3. Assign a permission set:
   a. From the contact’s user page, click Permission Set Assignments and then click Edit Assignments.
   b. From Available Permission Sets, select Customer Community Read Only and then click Add.
   c. Save your changes.

If the community is activated, an email is sent to the customer community user with community access information. Next, you can configure Financial Services Cloud Lightning components in your community with Community Builder.
The Lightning Flow for Financial Services Cloud package includes flows that are specific to retail banking and insurance. The flows help your service reps handle customer service requests better and more efficiently. The flows are installed as standard flow templates. You can also clone the templates to customize them according to your business processes.

The flows provide step-by-step guidance for common service requests, such as a change of address or beneficiary, without the need to navigate to different screens.

Lightning Flow for Insurance and Retail Banking

The Lightning Flow for Financial Services Cloud package includes flows that are specific to retail banking and insurance. The flows help your service reps handle customer service requests better and more efficiently. The flows are installed as standard flow templates. You can also clone the templates to customize them according to your business processes.

Flow Screen Components Provided in Financial Services Cloud

Financial Services Cloud provides screen components that extend the types of input fields available in flow screens.

Lightning Flow for Insurance and Retail Banking

The Lightning Flow for Financial Services Cloud package includes flows that are specific to retail banking and insurance. The flows help your service reps handle customer service requests better and more efficiently. The flows are installed as standard flow templates. You can also clone the templates to customize them according to your business processes.

The flows provide step-by-step guidance for common service requests, such as a change of address, nominee, or beneficiary, without the need to navigate to different screens.
Install Lightning Flow for Financial Services Cloud

Install the Lightning Flow for Financial Services Cloud package from your preferred browser.

1. Copy

https://industries.secure.force.com/financialservicescloudflow into your browser, and press Enter.

2. Enter your username and password for the Salesforce org in which you want to install the package, and then click Log In.

3. Select Install for Admins Only, Install for All Users, or Install for Specific Profiles, and then click Install.

Note: If the package isn’t installed, see Why did my installation or upgrade fail?

You can now complete the configuration steps to make the flows ready for use.

Configure Lightning Flow for Financial Services Cloud

Before you can use the flow templates to create flows, create a support process and a case record type. You then link the case record type to the Create Service Request subflow. You can use an existing case record type or support process. However, we recommend that you create a separate support process and case record type dedicated to the flow-related cases.

Create and Manage Flows

You can customize the provided flows to meet your needs and add quick actions.
Configure Lightning Flow for Financial Services Cloud

Before you can use the flow templates to create flows, create a support process and a case record type. You then link the case record type to the Create Service Request subflow. You can use an existing case record type or support process. However, we recommend that you create a separate support process and case record type dedicated to the flow-related cases.

Create a Support Process
Create a support process for the types of cases that the flows create.

1. From Setup, in the Quick Find box, enter Support Processes, and then select Support Processes.
2. Click New.
3. In the Existing Support Process list, select Master.
4. For Support Process Name, enter a descriptive name. For example, enter Service Request.
5. Optionally, enter a description for the support process. For example, enter Process for logging customer service cases through flows.
6. Click Save.
7. Leave the Case Status as is, and click Save.

Now create a case record type.

Create a Case Record Type
Create a case record type for the cases that the flows create.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Case, and then select Case.
3. Click Record Types, and then click New.
4. In the Existing Record Type list, to copy all available picklist values, select Master. Or, select a specific record type to clone only its picklist values.
5. Enter a record type label that’s unique within the object. For example, enter Flow Service Request.
6. In the Support Process list, select the support process that you created for the flows.
7. Optionally, enter a description for the record type. For example, enter Record type for cases created by flows.
8. To activate the record type, select Active.
9. Complete the remaining steps according to your requirements.
10. Save your changes, and then edit the values of the standard and custom picklists available for the record type.

11. In your browser, copy the ID of the record type. You need this ID for configuring the Create Service Request subflow.

Now link the case record type to the Create Service Request subflow.

Customize the Create Service Request Subflow

The Create Service Request subflow is installed as a standard flow template. Clone the template and link it to your case record type.

1. From Setup, in the Quick Find box, enter Flows, and then select Flows.
2. In the list of flows, next to Subflow: Create Service Request, click Open.
3. Click Save As, and select A New Flow.
4. Enter a label for the flow, and click Save.
5. In the left pane, click the Manager tab.
6. Under Variables, click CaseRecordTypeId.
7. In the Edit Variable window’s Default Value field, paste the case record type ID that you copied from the browser.
8. Click Done.

Create and Manage Flows

You can customize the provided flows to meet your needs and add quick actions.

Provided Flows
Several flows for common service requests in retail banking and insurance are included with the Lightning Flow for Financial Services Cloud package.

Customize a Prepackaged Flow
The flows in the package are installed as standard flow templates. You can clone a template and customize it to suit your business processes.

Create a Quick Action for a Flow
Give users easy access to a flow by creating a quick action. When you add the quick action to the Person Account page layout, users can launch the flow from person account record pages.

Add Quick Actions to the Person Account Page Layout
Add the quick actions to the Person Account page layout so that they appear in the action menu on the highlights panel on Person Account record pages.

View a Flow’s Output
A flow’s output is a case record and a JSON string. The JSON string contains the key pieces of information that are provided during the execution of the flow. If you have an integrated back-end system, you can use the JSON string to record the collected information into your back-end system. To view a flow’s JSON output in Lightning Experience, create a report.

Restrict File Types to Upload in a Flow
Files uploaded during a flow are attached to the case record that the flow creates. By default, all file types can be uploaded. You can choose which file types you want to allow.
Set an Approval Limit for Disputed Transactions
For disputed transactions, you can set an approval limit for service reps. If a disputed transaction amount is within the approval limit, the Dispute Transactions flow marks the resulting case as Closed. Otherwise, the case status is marked as New.

Add Documents to the Send Documents Flow
The Send Documents flow has a list of a few commonly used documents. You can add more documents to the list.

Considerations for Working with Flows
Review these points to understand how the provided flows work.

Provided Flows
Several flows for common service requests in retail banking and insurance are included with the Lightning Flow for Financial Services Cloud package.

<table>
<thead>
<tr>
<th>Flow</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate Card</td>
<td>Activate a new debit or credit card linked with a financial account.</td>
</tr>
<tr>
<td>Close Account</td>
<td>Close a financial account.</td>
</tr>
<tr>
<td>Dispute Transactions</td>
<td>Dispute one or more transactions for a financial account.</td>
</tr>
<tr>
<td>Issue New Card</td>
<td>Issue a new card for a financial account and send it to the customer’s billing or shipping address.</td>
</tr>
<tr>
<td>Order Checks</td>
<td>Send checks for a financial account to the customer’s billing or shipping address.</td>
</tr>
<tr>
<td>Send Documents</td>
<td>Send various financial documents for an account to the customer’s billing or shipping address.</td>
</tr>
<tr>
<td>Send Statement</td>
<td>Email an account statement or send it to the customer’s billing or shipping address.</td>
</tr>
<tr>
<td>Update Address</td>
<td>Change the address associated with a financial account.</td>
</tr>
<tr>
<td>Update Billing Date and Frequency</td>
<td>Change the billing date and frequency for a financial account.</td>
</tr>
<tr>
<td>Update Card Limits</td>
<td>Update the daily withdrawal or credit limit for a card associated with a financial account.</td>
</tr>
<tr>
<td>Update Communication Preferences</td>
<td>Update a customer’s communication preferences. The preferences include email, phone, marketing, and fax.</td>
</tr>
<tr>
<td>Waive Fees</td>
<td>Waive the fees levied on a financial account.</td>
</tr>
</tbody>
</table>
Table 5: Flows for Insurance

<table>
<thead>
<tr>
<th>Flow</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Beneficiary to Policy</td>
<td>Add a beneficiary to a life or home insurance policy.</td>
</tr>
<tr>
<td>Add Driver to Auto Policy</td>
<td>Add a driver to an auto insurance policy.</td>
</tr>
<tr>
<td>Cancel Policy</td>
<td>Cancel an insurance policy.</td>
</tr>
<tr>
<td>Initiate FNOL</td>
<td>Initiate the first notification of loss for an insurance policy.</td>
</tr>
<tr>
<td>Initiate Loan Against Policy</td>
<td>Initiate a loan against a policy at the customer’s request.</td>
</tr>
<tr>
<td>Send Documents</td>
<td>Send policy-related documents for an insurance policy to the customer’s billing or shipping address.</td>
</tr>
<tr>
<td>Update Communication Preferences</td>
<td>Update a policyholder’s communication preferences. The preferences include email, phone, marketing, and fax.</td>
</tr>
<tr>
<td>Update Customer Details</td>
<td>Update policyholder information, such as name, email address, and phone number.</td>
</tr>
<tr>
<td>Update Lienholder</td>
<td>Change the lienholder on a home or auto insurance policy.</td>
</tr>
<tr>
<td>Update Policy Beneficiary Details</td>
<td>Update a policy beneficiary’s information, such as name, email address, phone number, and share percentage.</td>
</tr>
<tr>
<td>Update Premium Payment Date and Frequency</td>
<td>Change the premium payment date and frequency for an insurance policy.</td>
</tr>
<tr>
<td>Update Premium Payment Method</td>
<td>Change the current method or add a method for paying the premium of an insurance policy.</td>
</tr>
</tbody>
</table>

Customize a Prepackaged Flow

The flows in the package are installed as standard flow templates. You can clone a template and customize it to suit your business processes.

Before you begin, customize the Create Service Request subflow and link it to the case record type.

1. From Setup, in the Quick Find box, enter Flows, and then select Flows.
2. Click New Flow.
3. In the list of templates, select the template that you want to clone, and click Create.
4. Replace the original Create Service Request subflow with the customized subflow that you linked to the case record type.
   a. On the Elements tab, drag the Subflow element on the canvas.
   b. In the search box, enter the name of the new subflow, and then select it.
   c. Enter the required details, and set the input values as they are in the original Create Service Request subflow.
   d. Click Done.
   e. Delete the original Create Service Request subflow. Then connect your new subflow to the source and target elements that the original Create Service Request subflow was connected to.
5. Customize the flow according to your business requirements, and then save your changes.

6. Activate the flow.
   a. In the list of flows, click the name of the new flow.
   b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

Now create a quick action for the flow.

**Create a Quick Action for a Flow**

Give users easy access to a flow by creating a quick action. When you add the quick action to the Person Account page layout, users can launch the flow from person account record pages.

1. From Setup, open **Object Manager**.
2. Click **Account**.
3. Click **Buttons, Links, and Actions**, and then click **New Action**.
4. In the Action Type list, select **Flow**.
5. In the Flow list, select the flow that you want to create the quick action for.
6. Leave the Standard Label Type field as is.
7. Enter a label for the action. Users see this label as the name of the action.
8. Save your changes.

Now add the quick action to the Person Account Page layout.

**Add Quick Actions to the Person Account Page Layout**

Add the quick actions to the Person Account page layout so that they appear in the action menu on the highlights panel on Person Account record pages.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter **Person Account**, and then select **Person Account**.
3. Click **Page Layouts**, and then click **Person Account Layout**.
4. On the palette, select **Mobile & Lightning Actions**.
5. Drag the quick actions to the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.

**View a Flow’s Output**

A flow’s output is a case record and a JSON string. The JSON string contains the key pieces of information that are provided during the execution of the flow. If you have an integrated back-end system, you can use the JSON string to record the collected information into your back-end system. To view a flow’s JSON output in Lightning Experience, create a report.

1. Create a custom report type.
   a. From Setup, in the Quick Find box, enter **Report Types**, and then select **Report Types**.
   b. Click **New Custom Report Type**.
   c. In the Primary Object list, select **Case Gateway Requests**.
d. Enter a label for the report type. The label can be up to 50 characters long.

e. Enter a description for the report type. The description can be up to 255 characters long.

f. Select the category in which you want to store the custom report type.

g. Click Next, and then click Save.

2. Create a report.

a. In your org, on the Reports tab, click New Report.

b. In the list of report types, select your report type, and then click Next.

c. Add the Integration Payload field to the report.

d. Click Save & Run.

Restrict File Types to Upload in a Flow

Files uploaded during a flow are attached to the case record that the flow creates. By default, all file types can be uploaded. You can choose which file types you want to allow.

1. Open the flow, and double-click the screen element that contains the File Upload component.

2. In the Edit Screen window, select the File Upload component.

3. In the right pane, in the Accepted Formats field, enter a comma-separated list of the file extensions that users can upload.

4. Click Done, and then save your changes.
Set an Approval Limit for Disputed Transactions

For disputed transactions, you can set an approval limit for service reps. If a disputed transaction amount is within the approval limit, the Dispute Transactions flow marks the resulting case as Closed. Otherwise, the case status is marked as New.

1. From Setup, in the Quick Find box, enter Custom Metadata Types, and then select Custom Metadata Types.
2. In the list of custom metadata types, next to Transaction Dispute Approval Limit, click Manage Records.
3. Click New.
4. Enter a label for the approval limit.
5. In the Agent Approval Limit field, enter the approval limit amount.
6. Save your changes.

Add Documents to the Send Documents Flow

The Send Documents flow has a list of a few commonly used documents. You can add more documents to the list.

1. Open the Send Documents flow, and then double-click the Correspondence Selection screen element.
2. In the Edit Screen window, select the Documents list.
3. In the right pane, under Select Choices, click Add Choice to add a document to the Documents list.
4. Click Done, and then save your changes.

Considerations for Working with Flows

Review these points to understand how the provided flows work.

- Most of the provided flows don’t add or update any records in your org. However, some flows add or update the corresponding record during execution because the subsequent steps in the flow need the new or updated record to proceed. For example, the Add Beneficiary to Policy flow adds the new beneficiary so that the beneficiary’s share percentage can be specified in the subsequent step. These flows add or update records.
  - Add Beneficiary to Policy
  - Add Driver to Auto Policy
  - Dispute Transactions
  - Initiate FNOL
  - Update Billing Date and Frequency
  - Update Communication Preferences
  - Update Lienholder
  - Update Policy Beneficiary Details
  - Update Premium Payment Method
  - Waive Fees
• The Dispute Transactions flow creates a case and a case gateway request for each transaction selected during the flow. Having a separate case for each disputed transaction makes it easier to track each case against its own service-level agreement (SLA).
• To use a flow, a user must have access to the underlying object and its fields. For example, for the Update Communication Preferences flow, the user must have access to the Do Not Call, Email Opt Out, Fax Opt Out, and Marketing Opt-Out fields on the Contact object.

Flow Screen Components Provided in Financial Services Cloud

Financial Services Cloud provides screen components that extend the types of input fields available in flow screens.

- **Button Picklist from Collection**
  Display labels from a collection variable in a list of buttons.

- **Button Picklist from Field**
  Display labels from a collection variable in a list of buttons.

- **Checkbox Group from Collection**
  Populate a checkbox group with values from a text collection variable, and let user choose multiple options.

- **Footer with Customizable Buttons**
  Display a custom button in the flow screen footer, customize text for the Next button, and controls display of the Previous button.

- **Screen Button**
  Add a custom button to the body of your screen.

- **Define Columns and Rows for a Single-Select or Multi-Select Table**
  To define the columns for a table, create a text collection variable that contains the API names of the fields that you want to include in the table. To define the rows for the table, create a text collection variable that contains a list of record IDs that you want to include in the table.

- **Configure a Single-Select Table**
  The Single-Select Table screen component displays a table with a radio button next to each row in the table. A user can select one record in the table. The selected record is an input to the next step in the flow. You can use variables or global constants to specify the values for the component attributes or manually enter values.

- **Configure a Multi-Select Table**
  The Multi-Select Table screen component displays a table with a checkbox next to each row in the table. A user can select one or more records in the table. The selected records are inputs to the next step in the flow. You can also use this component to display static data in a tabular format. You can use variables or global constants to specify the values for the component attributes or manually enter values.

SEE ALSO:

- Provided Flow Screen Components
Button Picklist from Collection

Display labels from a collection variable in a list of buttons.

For information about adding screen components to your flow screen, see Flow Element: Screen.

Note: This screen component requires Lightning runtime.

Configure the Button Picklist from Collection Component

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can’t end with an underscore. It also can’t have two consecutive underscores.</td>
</tr>
<tr>
<td>Choice Labels</td>
<td>Add a text collection variable containing choice labels to this component.</td>
</tr>
<tr>
<td></td>
<td>Note: You can’t reorder choices or select the same choice twice.</td>
</tr>
<tr>
<td>Choice Values</td>
<td>Add a collection variable containing API values that correspond to the choice labels for this component.</td>
</tr>
<tr>
<td>Help Text</td>
<td>Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.</td>
</tr>
<tr>
<td>Label</td>
<td>User-friendly text that displays to the left of the component.</td>
</tr>
<tr>
<td>Required</td>
<td>Requires users to select a value before they can move to the next screen.</td>
</tr>
<tr>
<td>Selected Values</td>
<td>A collection variable containing default choice values.</td>
</tr>
</tbody>
</table>

Usage

All attributes are available to store in flow variables, but the Selected Values attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user’s action, map the Selected Values attribute to a collection variable.

Tip: By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component’s screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute and store that attribute’s output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud
Provided Flow Screen Components
Button Picklist from Field

Display labels from a collection variable in a list of buttons.

For information about adding screen components to your flow screen, see Flow Element: Screen.

Note: This screen component requires Lightning runtime.

Configure the Button Picklist from Field Component

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can’t end with an underscore. It also can’t have two consecutive underscores.</td>
</tr>
<tr>
<td>Label</td>
<td>The label for the picklist. This attribute accepts single-value resources. The value is treated as text.</td>
</tr>
<tr>
<td>Object API Name</td>
<td>The API name of the object that the picklist field belongs to.</td>
</tr>
<tr>
<td>Picklist API Name</td>
<td>The API name of the picklist field.</td>
</tr>
<tr>
<td>Required</td>
<td>Requires users to select a value before they can move to the next screen.</td>
</tr>
<tr>
<td>Selected Value</td>
<td>The default value for the component.</td>
</tr>
</tbody>
</table>

Usage

All attributes are available to store in flow variables, but the Selected Value attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user’s action, map the Selected Value attribute to a variable.

Tip: By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component’s screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute and store that attribute’s output value in a variable.

SEE ALSO:
- Flow Screen Components Provided in Financial Services Cloud
- Provided Flow Screen Components
Checkbox Group from Collection

Populate a checkbox group with values from a text collection variable, and let user choose multiple options.

For information about adding screen components to your flow screen, see Flow Element: Screen.

Note: This screen component requires Lightning runtime.

Configure the Checkbox Group from Collection Component

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can’t end with an underscore. It also can’t have two consecutive underscores.</td>
</tr>
<tr>
<td>Choice Labels</td>
<td>Add a text collection variable containing choice labels to this component.</td>
</tr>
<tr>
<td></td>
<td>Note: You can’t reorder choices or select the same choice twice.</td>
</tr>
<tr>
<td>Choice Values</td>
<td>A collection variable containing API values that correspond to the choice labels for this component.</td>
</tr>
<tr>
<td>Group Label</td>
<td>User-friendly text that displays for the component.</td>
</tr>
<tr>
<td>Selected Values</td>
<td>A collection variable containing default choice values.</td>
</tr>
</tbody>
</table>

Usage

All attributes are available to store in flow variables, but the Selected Values attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user’s action, map the Selected Values attribute to a collection variable.

Tip: By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component’s screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute and store that attribute’s output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud
Provided Flow Screen Components
Footer with Customizable Buttons

Display a custom button in the flow screen footer, customize text for the Next button, and controls display of the Previous button.

For information about adding screen components to your flow screen, see Flow Element: Screen.

Note: This screen component requires Lightning runtime.

Configure the Footer with Customizable Buttons Component

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can’t end with an underscore. It also can’t have two consecutive underscores.</td>
</tr>
<tr>
<td>Custom Button Label</td>
<td>The label for the custom button. This attribute accepts single-value resources. The value is treated as text.</td>
</tr>
<tr>
<td>Custom Button Value</td>
<td>Whether the button was clicked. This attribute accepts single-value Boolean resources.</td>
</tr>
<tr>
<td>Next Button Label</td>
<td>The label for the Next button. This attribute accepts single-value resources. The value is treated as text.</td>
</tr>
<tr>
<td>Show Previous Button</td>
<td>Whether the Previous button is displayed. This attribute accepts single-value Boolean resources.</td>
</tr>
</tbody>
</table>

Usage

All attributes are available to store in flow variables, but Custom Button Value is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user’s action, map the Custom Button Value attribute to a Boolean flow variable or a Boolean field on a record variable.

Tip: By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component’s screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute and store that attribute’s output value in a variable.

SEE ALSO:
Flow Screen Components Provided in Financial Services Cloud
Provided Flow Screen Components
Screen Button

Add a custom button to the body of your screen.

For information about adding screen components to your flow screen, see Flow Element: Screen.

Note: This screen component requires Lightning runtime.

Configure the Screen Button Component

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can’t end with an underscore. It also can’t have two consecutive underscores.</td>
</tr>
<tr>
<td>Button Value</td>
<td>Whether the button was clicked. This attribute accepts single-value Boolean resources.</td>
</tr>
<tr>
<td>Label</td>
<td>The label for the button. This attribute accepts single-value resources. The value is treated as text.</td>
</tr>
</tbody>
</table>

Usage

All attributes are available to store in flow variables, but Button Value is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user’s action, map the Button Value attribute to a Boolean flow variable or a Boolean field on a record variable.

Tip: By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component’s screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute and store that attribute’s output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud
Provided Flow Screen Components
Define Columns and Rows for a Single-Select or Multi-Select Table

To define the columns for a table, create a text collection variable that contains the API names of the fields that you want to include in the table. To define the rows for the table, create a text collection variable that contains a list of record IDs that you want to include in the table.

1. Define the columns for the table.
   a. Create a text collection variable.
   b. Use an Assignment element to assign the API names of the fields to the text collection variable. The fields must be from the same object. Add the fields in the order in which you want them to appear in the table.
   c. Connect the Assignment element at the appropriate place in the flow.

2. Define the rows for the table.
   a. Create a record collection variable.
   b. Use a Get Records element to populate the record collection variable with the records that you want to include in the table.
   c. Create a text collection variable.
   d. Create a loop that iterates over the record collection variable to fetch individual record IDs. Within the loop, use an Assignment element to add the fetched record IDs to the text collection variable.
   e. At the end of the loop, use the text collection variable as an input to the table.

Configure a Single-Select Table

The Single-Select Table screen component displays a table with a radio button next to each row in the table. A user can select one record in the table. The selected record is an input to the next step in the flow. You can use variables or global constants to specify the values for the component attributes or manually enter values.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>Enter a unique API name for the table.</td>
</tr>
</tbody>
</table>
**Configure a Multi-Select Table**

The Multi-Select Table screen component displays a table with a checkbox next to each row in the table. A user can select one or more records in the table. The selected records are inputs to the next step in the flow. You can also use this component to display static data in a tabular format. You can use variables or global constants to specify the values for the component attributes or manually enter values.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columns</td>
<td>Enter a text collection variable that contains a list of field API names that you want to include in the table.</td>
</tr>
<tr>
<td>Records</td>
<td>Enter a text collection variable that contains a list of record IDs that you want to include in the table.</td>
</tr>
<tr>
<td>Error Messages</td>
<td>Enter a variable to store error messages returned by the component.</td>
</tr>
<tr>
<td>Selected Record</td>
<td>Enter a text variable to store the selected record.</td>
</tr>
</tbody>
</table>

**Table 7: Multi-Select Table Component Attributes**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Name</td>
<td>Enter a unique API name for the table.</td>
</tr>
<tr>
<td>Columns</td>
<td>Enter a text collection variable that contains a list of field API names that you want to include in the table.</td>
</tr>
<tr>
<td>Records</td>
<td>Enter a text collection variable that contains a list of record IDs that you want to include in the table.</td>
</tr>
<tr>
<td>Editable Column</td>
<td>Enter the API name of the column that you want to be editable in the table. You can have only one editable column, and it must be one of the columns that you entered in the Columns field.</td>
</tr>
<tr>
<td>Rows Selectable</td>
<td>To make the records in the table selectable, enter True. The default is False.</td>
</tr>
<tr>
<td>Error Messages</td>
<td>Enter a variable to store error messages returned by the component.</td>
</tr>
<tr>
<td>Selected Records</td>
<td>Enter a text collection variable to store the selected records.</td>
</tr>
</tbody>
</table>

**Note:** To access individual record IDs, create a loop that iterates over this collection variable.
Security guidelines for integrating with Outlook and protecting your data.

Guidelines for Salesforce for Outlook
If your firm uses Salesforce for Outlook, consider these guidelines when syncing contacts, events, tasks, and email.

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, remember these considerations when securing your confidential client data using Platform Encryption, event monitoring, and Field Audit Trail.

Connect to Customers with Pardot in Financial Services Cloud
Access Pardot, a full suite of marketing tools, in Financial Services Cloud.

Guidelines for Salesforce for Outlook
If your firm uses Salesforce for Outlook, consider 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.

  **Tip:** 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.

Financial Services Cloud is available in Lightning Experience.
Available in: **Professional**, **Enterprise**, and **Unlimited** editions.
Securing Your Data with Salesforce Shield

Salesforce Shield—a set of security tools that helps you protect data at rest, monitor usage, and prevent malicious activity—is fully supported. If you implement Shield, remember 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.

Considerations for Shield Platform Encryption

Shield 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. All Financial Services Cloud objects and fields are fully compliant with Shield Platform Encryption, excluding the restrictions in Financial Services Cloud Availability and Limitations.

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.

SEE ALSO:

Financial Services Cloud Availability and Limitations

Considerations for Shield Platform Encryption

Shield 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. All Financial Services Cloud objects and fields are fully compliant with Shield Platform Encryption, excluding the restrictions in Financial Services Cloud Availability and Limitations.

SEE ALSO:

Using Event Monitoring

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.

SEE ALSO:

Using Event Monitoring
Connect to Customers with Pardot in Financial Services Cloud

Access Pardot, a full suite of marketing tools, in Financial Services Cloud.

Create groups and relationships in Financial Services Cloud to sync to Pardot as the underlying Account and Contact records. You can map Financial Services Cloud custom objects such as Financial Account to Pardot custom objects.

If you use person accounts in your org, there are no changes to the way you work in Pardot.

If you use the individual data model, send 1:1 Salesforce Engage emails via the Contact list view in Lightning Experience or through the Contact record. In the individual data model, you see Pardot Contact fields and Visualforce pages in the Contact section on the client profile, but contact-specific buttons such as Send Engage Email aren’t visible.

SEE ALSO:
- Market to Your Customers with Pardot
- Person Account Syncing with Salesforce

EDITIONS

Financial Services Cloud is available in Lightning Experience.
Available in: Professional, Enterprise, and Unlimited editions.
Integrating data from custodians, banking systems, 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.

When uploading the data:

- Maintain consistent naming conventions for the account and contact parts of individual clients.
- Don’t upload financial transaction data that could override fields that are automatically calculated in Financial Services Cloud, doing so will affect other field values and roll-up summaries.

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

1. Individuals
2. Identification documents
3. Employment
4. Education
5. Relationship groups
6. Individuals’ relationships to groups
7. Charges and Fees
8. Financial accounts
9. Cards
10. Financial account transactions
11. Billing statements
12. Securities
13. Financial Holdings

Continue with the remaining objects in any sequence.

**Upload Data for Individuals Using Data Loader**

Start by uploading data about individuals using Data Loader. First upload Account data, then, if your org uses the individual model, Contact data. You can then add identification documents, employment, and education details that you hold for individuals.

**Upload Household Data Using Data Loader**

Upload data about households using Data Loader.

**Relate Individuals to Households Using Data Loader**

Relate individuals to households using Data Loader.

**Upload Financial Account Data Using Data Loader**

Add data about individuals’ financial accounts using Data Loader.
Upload Data for Individuals Using Data Loader

Start by uploading data about individuals using Data Loader. First upload Account data, then, if your org uses the individual model, Contact data. You can then add identification documents, employment, and education details that you hold for individuals.

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 valid values for picklist or multi-select picklist fields.
- Run the latest version of Data Loader, which is always available in Salesforce.

1. In Developer Console, look up the Id for the Account object record type. Use the following Account object record type IDs:
   - when using the individual object model, use IndustriesIndividual
   - when using the person accounts, use PersonAccount

   **Note:** If you created custom record types, use your values rather than the ones above. If you are using multiple record types, remember to look up their IDs too and assign users the correct record type ID.

   a. From the Salesforce header, open Developer Console.
   b. Select Query Editor.
   c. Enter this SOQL query: SELECT DeveloperName, Id, SobjectType FROM RecordType Where SobjectType='Account' AND DeveloperName='<record type ID>'

   ![Query Editor](query-editor.png)

   d. Execute the query.
   e. From the query results, copy the Id from the record.

2. In Data Loader, after you’ve logged in, export the Account object to a CSV file. We recommend that you:
   - Export the data to a new CSV file. Use 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 record that you upload.

**Important:** Every record must have this same RecordTypeId value. The FinServ__IndividualType__c field also shows the value, Individual, which confirms that the record is for 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. Remember these guidelines.
   - As records are created, the value of OwnerID defaults to your user ID. To assign another team member as owner, set the OwnerID to the person’s user ID.
   - Ensure that dates are formatted to match the date format specified for your org.
   - When entering data for an org using the person account model.
     - Used the FirstName and LastName columns instead of the Name column.
     - To import a custom Contact field, use the column `<Namespace_FieldName>__pc`. For example, to add data for the contact field `<Namespace>__Citizenship__c` add data to the `<Namespace>__Citizenship__pc` column
     - To import data a standard Contact field, use the `Person<FieldName>`. For example, to add a contact’s Birthdate field use the PersonBirthdate column.

5. In the Data Loader, use Insert and identify that you are uploading data to the Account object with the data from your updated account.csv file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

**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 records for individuals to verify the upload of Account data.

7. When using the individual object model, import the contact records corresponding to the imported account records.
   - In Data Loader, export the Contact object to a CSV file.
     - We recommend that you:
       - Export the data to a new CSV file. Use the file name `client_contact.csv`.
       - Choose **Select all fields** when creating your SOQL query. Specify the condition that the FinServ__IndividualType__c field = Individual.
   - b. In the client_contact.csv file, enter the data for the contact part of each individual, such as mailing address and email.
     - **Important:** Do not edit these fields as they uniquely identify each Contact record and its relationship with the Account record for the individual.
       - RecordTypeId
       - Id
       - FinServ__IndividualId__c
       - FinServ__IndividualType__c
       - AccountId
   - c. In Data Loader, use Update and identify that you are updating the Contact object with the data from your updated client_contact.csv file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.
d. In your org, check for the updated individual records to verify your upload of Contact data.

8. If you have identification documents to upload:
   a. In Data Loader, export the Identification Document object to a CSV file. We recommend that you:
      • Export the data to a new CSV file.
      • Use the file name id_docs.csv.
      • Choose Select all fields when creating your SOQL query.
   b. In the resulting id_docs.csv file, delete these columns:
      • Id
      • IsDeleted
      • CreatedDate
      • CreatedById
      • LastModifiedDate
      • LastModifiedById
      • SystemModStamp
      • LastActivityDate
      • LastViewedDate
      • LastReferencedDate
   c. In the id_docs.csv file, enter your data for identification documents.
      Note: If you haven't done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the AccountId for each record and add it to FinServ__Account__c.
   d. In Data Loader, use Insert and identify that you are updating the Identification Documents object with the data from your updated id_docs.csv file. Then choose Create or Edit a Map and select Auto-Match Fields to Columns. Upload your data.
   e. In your org, check for the identify document for individuals to verify the load.

9. If you have employment data to upload:
   a. In the Data Loader, export the Employment object to a CSV file. We recommend that you:
      • Export the data to a new CSV file.
      • Use the file name employment.csv.
      • Choose Select all fields when creating your SOQL query.
   b. In the resulting employment.csv file, delete these columns:
      • Id
      • IsDeleted
      • CreatedDate
      • CreatedById
      • LastModifiedDate
      • LastModifiedById
      • SystemModStamp
c. In the employment.csv file, enter your data for employment records.

Note: If you haven’t done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the Contact ID for each record and add it to FinServ__Contact__c.

d. In Data Loader, use Insert and identify that you are updating the Employment object with the data from your updated employment.csv file. Then choose Create or Edit a Map and select Auto-Match Fields to Columns. Upload your data.

e. In your org, check for the employment records for individuals to verify the load.

10. If you have education data to upload:

a. In Data Loader, export the Education object to a CSV file.
   We recommend that you:
   • Export the data to a new CSV file.
   • Use the file name education.csv.
   • Choose Select all fields when creating your SOQL query.

b. In the resulting employment.csv file, delete these columns:
   • Id
   • IsDeleted
   • CreatedDate
   • CreatedById
   • LastModifiedDate
   • LastModifiedById
   • SystemModStamp
   • LastActivityDate
   • LastViewedDate
   • LastReferencedDate

c. In the education.csv file, enter your data for education records.

Note: If you haven’t done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the Contact ID for each record and add it to FinServ__Contact__c.

d. In Data Loader, use Insert and identify that you are updating the Education object with the data from your updated education.csv file. Then choose Create or Edit a Map and select Auto-Match Fields to Columns. Upload your data.

e. In your org, check for the education records for individuals to verify the load.
Upload Household Data Using Data Loader

Upload 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 Developer Console.
   b. Select Query Editor.
   c. Enter this SOQL query: SELECT DeveloperName, Id, SobjectType FROM RecordType WHERE SobjectType='Account' AND DeveloperName='IndustriesHousehold'.

   Tip: As you queried for the Id in an earlier step when you uploaded individual data, check the History pane. If your previous query is listed, reuse it.

   d. Execute the query.
   e. From the query results, copy the Id from the record.

2. In Data Loader, export the Account object to a CSV file.
   We recommend that you export the data to a new CSV file and use the file name household.csv.

3. In the resulting household.csv file, delete all columns except:
   • FinServNotes__c
   • Name
   • RecordTypeId
   • OwnerId (Required only if you want to change OwnerId values so that team members are assigned ownership of household records)
   • Any custom fields that you’ve added.

4. In the household.csv file, paste the Id value that you copied from your earlier query into the RecordTypeId field for every household record that you upload.

5. In the household.csv file, enter the rest of your household data.

6. In Data Loader, use Insert and identify that you are updating the Account object with the data from your updated household.csv file. Choose Create or Edit a Map and select Auto-Match Fields to Columns. Upload your data.

7. In your org, check for the household records to verify your upload of Account data.
Relate Individuals to Households Using Data Loader

Relate individuals to households using Data Loader.

1. In Data Loader, export households from the Account object to a CSV file.
   We recommend that you:
   - Export the data to a new CSV file using 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 an individual 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 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).
   - Export the data to a new CSV file using 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.
   Remember these guidelines.
   - Roles define an individual’s role within the household, such as client, spouse, or dependent.
   - The value of IsDirect must be false for all records.
   - If the individual is the primary 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 Data Loader, use **Insert** and select **Show all Salesforce objects**, then identify that you are updating the Account Contact Relationship (AccountContactRelation) object with the data from your updated `acr.csv` file. Select **Create or Edit a Map** and choose **Auto-Match Fields to Columns**. Upload your data.

9. In your org, check the membership information in some households to verify your upload of AccountContactRelation data.

**Upload Financial Account Data Using Data Loader**

Add data about individuals’ financial accounts using Data Loader.

1. In Data Loader, export the Charges and Fees object to a CSV file.

   We recommend that you:
   - Export the data to a new CSV file.
   - Use the file name `charge_fee.csv`.
   - Choose **Select all fields** when creating your SOQL query.

2. In the resulting `charge_fee.csv` file, delete these columns:
   - Id
   - IsDeleted
   - CreatedDate
   - CreatedById
   - LastModifiedDate
   - LastModifiedById
   - SystemModStamp
   - LastActivityDate
   - LastViewedDate
   - LastReferencedDate

3. In the `charge_fee.csv` file, enter your data for Charges and Fees records.

   **Note:** As records are created the value of OwnerID defaults to your user ID. To assign another team member as owner, set the OwnerID to the person’s user ID.

4. In Data Loader, use **Insert** and identify that you are updating the Charges and Fee object with the data from your updated `charge_fee.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

5. In Data Loader, use the **Export** option to download the content or the Charges and Fees object. Call the exported file `loaded_charge_fee.csv`. You use this file to identify the ID of charges and fees items related to Financial Accounts.

6. 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.


   We recommend that you:
   - Export the data to a new CSV file.
   - Use the file name `financialaccount.csv`.
   - Choose **Select all fields** when creating your SOQL query.
8. In the resulting `financialaccount.csv` file, delete these columns:
   - Id
   - CreatedDate
   - CreatedById
   - LastModifiedDate
   - LastModifiedById
   - SystemModStamp
   - LastActivityDate
   - LastViewedDate
   - LastReferencedDate
   - FinServHousehold__c

9. In the `financialaccount.csv` file, enter the rest of your financial account data.
   We recommend that you:
   - Use the `loaded_charge_fee.csv` to determine the ID of Charges and Fees items and add that ID to the `fscwmmain__FinancialAccountChargesAndFees__c` column.
   - 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.
   - 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.

10. In Data Loader, use Insert and identify that you are updating the Financial Accounts object with the data from your updated `financialaccount.csv` file. Then choose Create or Edit a Map and select Auto-Match Fields to Columns. Upload your data.

11. In your org, check for the new financial account records to verify your upload.

12. In Data Loader, export the FinancialAccount object to a CSV file. Choose the file name `loaded_financial_accounts.csv`. This export file is used later to relate cards, billing statements, financial account transactions, and financial holdings to financial accounts.

13. If you have card data to upload:
   a. In Data Loader, export the Card object to a CSV file.
      We recommend that you:
      - Export the data to a new CSV file.
      - Use the file name `card.csv`.
      - Choose Select all fields when creating your SOQL query.

   b. In the resulting `card.csv` file, delete these columns:
      - Id
      - IsDeleted
      - CreatedDate
      - CreatedById
c. In the *card.csv* file, enter your data for Card records. 
To add the relevant references:
- Update `fscwmmain__AccountHolder__c` with the card owner’s accountID, which you can look up in the `client_contact.csv` file.
- Update `fscwmmain__FinancialAccount__c` with the financial account’s ID, which you can look up in the `loaded_financial_accounts.csv` file.

d. In Data Loader, use *Insert* and identify that you are updating the Card object with the data from your updated *card.csv* file.
Then choose *Create or Edit a Map* and select *Auto-Match Fields to Columns*. Upload your data.
e. In your org, check for the new card records to verify your upload.

14. If you have billing statements to upload:

a. In Data Loader, export the Billing Statement object to a CSV file.
We recommend that you:
- Export the data to a new CSV file.
- Use the file name `statement.csv`.
- Choose *Select all fields* when creating your SOQL query.

b. In the resulting *statement.csv* file, delete these columns:
- `Id`
- `IsDeleted`
- `CreatedDate`
- `CreatedById`
- `LastModifiedById`
- `SystemModStamp`
- `LastActivityDate`
- `LastViewedDate`
- `LastReferencedDate`

c. In the *statement.csv* file, enter your data for billing statement records.
To add the relevant references, update `fscwmmain__FinancialAccount__c` with the financial account’s ID, which you can look up in the `loaded_financial_accounts.csv` file.

d. In Data Loader, use *Insert* and identify that you are updating the Billing Statement object with the data from your updated *statement.csv* file. Then choose *Create or Edit a Map* and select *Auto-Match Fields to Columns*. Upload your data.
e. In your org, check for the statement records to verify your upload.
15. If you have financial account transactions to upload:
   a. In Data Loader, export the Billing Statement object to a new CSV file using the file name `loaded_statements.csv`. This export file is used to find the details needed to relate financial account transactions to billing statements.
      We recommend that you:
      • Export the data to a new CSV file.
      • Use the file name `transactions.csv`.
      • Choose **Select all fields** when creating your SOQL query.
   c. In the resulting `transactions.csv` file, delete these columns:
      • Id
      • OwnerID (unless you wish to assign ownership of the record to a team member other than yourself)
      • IsDeleted
      • CreatedDate
      • CreatedById
      • LastModifiedDate
      • LastModifiedById
      • SystemModStamp
      • LastActivityDate
      • LastViewedDate
      • LastReferencedDate
   d. In the `transactions.csv` file, enter your data for account transactions records.
      To add the relevant references:
      • Update `fscwmmain__FinancialAccount__c` with the ID of the financial account the transaction is for. Look up financial account's ID in the `loaded_financial_accounts.csv` file.
      • Update `fscwmmain__BillingStatements__c` with the ID of the statement the transaction appears on. Look up the statement ID in the `loaded_statements.csv` file.
      • Update OwnerID with the user ID of the team member who owns the transaction.
   e. In Data Loader, use `Insert` and identify that you are updating the Financial Account Transaction object with the data from your updated `transactions.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.
   f. In your org, check for the transaction records to verify your upload.
Custom settings enable you to alter the behavior of your Financial Services Cloud installation.

**Note:** Hierarchical settings can be applied to the org, objects, and users with settings applying to the entities lower down the hierarchy. For example, assessing applied to org automatically applies to objects and users.

### Table 8: Financial Services Cloud Custom Settings

<table>
<thead>
<tr>
<th>Settings group</th>
<th>Setting</th>
<th>Effect</th>
<th>Hierarchical</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2C Lead Company Name Config</td>
<td>Override Company Name</td>
<td>Indicates whether the company name is replaced with a lead name when saving a lead with a record type of B2C. See Configure Company Name Override for Leads</td>
<td>Yes</td>
</tr>
<tr>
<td>Individual Excluded Fields</td>
<td>Excluded Fields</td>
<td>List of fields that are not returned for an Individual.</td>
<td>No</td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Account Name format</td>
<td>Indicates whether account name is displayed as [last name] [first name] or [first name] [last name]. See Reorder an Individual’s First Name and Last Name</td>
<td>Yes</td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Application Name</td>
<td>For internal use only.</td>
<td>Yes</td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Create Inverse</td>
<td>Indicates whether reciprocal AAR record is created.</td>
<td>Yes</td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Default Individual Type</td>
<td>Indicates the default record type for individuals. Defaults to Individual.</td>
<td>Yes</td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Dependent Packages</td>
<td>Comma-separated list of dependent packages whose fields will be auto resolved.</td>
<td>Yes</td>
</tr>
<tr>
<td>Settings group</td>
<td>Setting</td>
<td>Effect</td>
<td>Hierarchical</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For example, by including FSC in this list, when <code>Amount__c</code> is entered in query builder it is automatically added so the query builder uses <code>&lt;namespace&gt;__Amount__c</code>.</td>
<td></td>
</tr>
<tr>
<td>Industries Application Config</td>
<td>Individual Account Creation from Contact</td>
<td>Indicates whether the account part of the Individual is created when creating a contact.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Lead Conversion Batch Size</td>
<td>Defines the batch size for processing lead conversions when converting multiple Individual leads.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Multiple Relationship Groups</td>
<td>Enables a contact to be a member or related member of multiple relationship groups. See Enable Multiple Relationship Groups.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Page Layout Api Version</td>
<td>Specifies the REST API version used when retrieving page layout information.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Restrict ACR Record Visibility</td>
<td>Indicates whether only users with at least read access to the account and contact records in an account-contact relationship record can see the record in relationship components.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Show Detailed Error Messages</td>
<td>Indicates whether a detailed error message is shown when someone performs an action without having permission. See Show Detailed Error Messages.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Sync Individual System Fields</td>
<td>Indicates whether Account and Contact system fields are kept in sync when an insert is performed on either entity.</td>
<td>Yes</td>
</tr>
<tr>
<td>Use Person Account</td>
<td>Enable</td>
<td>Indicates whether the org uses the person account model for individuals. Personal care model is turned on by default. See Enable Person Accounts in Financial Services Cloud and Enable Person Accounts in Financial Services Cloud.</td>
<td>No</td>
</tr>
<tr>
<td>Settings group</td>
<td>Setting</td>
<td>Effect</td>
<td>Hierarchical</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------</td>
<td>------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Disable Person Accounts in Financial Services Cloud</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Enable Business Referrals Made</td>
<td>Indicates whether the Business Referrals made list and referrals made summary components are enabled.</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Enable Group Record Rollups</td>
<td>Indicates whether rolling of household__c field to records is performed. See Temporarily Disable Rollups to Accelerate Data Loads</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Enable Referrer Score</td>
<td>Indicates whether referrer score calculations are performed. See Enable the Referrer Score</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Enable Rollup Summary</td>
<td>Indicates whether rollup summary calculations are performed. See Temporarily Disable Rollups to Accelerate Data Loads</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Group Record Rollup Timestamp</td>
<td>For internal use only.</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Interaction Update Frequency</td>
<td>Specifies the frequency (in minutes) with which the Last Interaction and Next Interaction dates are updated.</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Rejected Referral Status</td>
<td>Indicates whether the Lead Status is used to identify rejected referrals.</td>
<td>Yes</td>
</tr>
<tr>
<td>Wealth Application Config</td>
<td>Rollup Summary Timestamp</td>
<td>For internal use only.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Financial Services Cloud works differently from other Salesforce features. Learn about the issues to expect as you implement the app and as your users start to work in it.

**Important:** Financial Services Cloud objects such as Financial Account, Financial Account Role, and Assets and Liabilities support up to 70 million records at rest. Data Loader is supported for loads of up to 5 million records. Rollup summary calculations support a load volume of 5 million Financial Account records.

To support or load records above these limits, we recommend you work with a Salesforce partner. Or visit the AppExchange for a suitable data load partner product. The number of records you can import depends on your permissions and the type of data you’re importing. You can import as many records as allowed, as long as you don’t exceed the overall data storage limits for your org.

**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 by 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 other Sales Cloud or Service Cloud functionality may not be possible or may require additional configuration steps.

**Features Not Supported with Financial Services Cloud**

- Accessibility features aren’t incorporated.
- Shared Activities aren’t supported in group roll-up summaries.

**Feature Limitations**

**General Limitations**

- The number of Financial Account records you can associate with an Account record is limited. Exceeding the number of Financial Account records may cause a query row governor limit error, "System.LimitException: FinServ:Too many query rows: 50001", to occur.
Financial Services Cloud Availability and Limitations

- When users create or edit group memberships, group roll-up summaries are updated automatically, except when a person is made a member of multiple groups. Group roll-up summary data is reflected only for the primary group.
- Lead conversion is not supported for Group record types, including the Household account record type.
- When multicurrency is enabled, note the following 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 organization’s active currencies.
- Localization in Danish, Dutch, French, German, Italian, Japanese, Portuguese (Brazil), and Spanish are provided, with the following exceptions.
  - The names of the packaged Advisor, Personal Banker, Relationship Manager, and Client Associate profiles 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.
- Activity roll-up fields to a group are not supported when Allow Users to Relate Multiple Contacts to Tasks and Events is enabled.
- Roll-up summary fields aren’t available in a Partial Copy sandbox. To use roll-up summary fields in a Partial Copy sandbox, create a Full sandbox or install the Financial Services Cloud managed package in a Partial Copy sandbox.
- When you create a CCR or AAR record using the external ID, Salesforce creates an inverse CCR or AAR record and appends "_inverse" to the inverse record’s external id. External IDs can be a maximum of 56 characters.
- If you deactivate an Account Contact Relationship between a business and an individual, you can’t create a new Account Contact Relationship between them. Instead, reactivate the original Account Contact Relationship.
- Financial Services Cloud installation is not supported on an org with a previously installed version of the Wealth Management app.
- Financial Services Cloud custom components aren’t fully supported in the Salesforce mobile app.
- The flows in Financial Services Cloud are available only in English.

Individual Data Model Limitations

- To follow an individual, make sure that you explicitly follow the individual’s account and contact records. To follow both account and contact records automatically, contact your Salesforce representative.
- In Financial Services Cloud, the unified object view of an individual relies on the Contact redirect. In the Retail Banking console, this redirect might be disabled in your org. To enable the redirect, see Set Up a New Lightning Page for Contact Records.
- When you create an individual account, the name fields on Account and Contact are synchronized. Financial Services Cloud account names don’t include salutations, middle names, or suffixes. For example, Dr. John Michael Smith Jr. appears as John Smith.
- Duplicate Management isn’t fully supported. Detection and prevention are supported; record merge isn’t supported.
- Access to individual and group profiles on the Salesforce mobile app is not fully supported. For more information, see Modify the Salesforce App Navigation Menu.
- Deleting an individual via Salesforce Inbox is not supported.
- Creating a client record via Salesforce Inbox is not supported.

Person Accounts for Financial Services Cloud Limitations

- The Create Individual - Financial Services Cloud component (the Client Profile Builder) is not supported.
- Person accounts are displayed as contacts in the Salesforce Inbox sidebar.
- Creating a client record via Salesforce Inbox is not supported.
Client Segmentation Analytics Limitations

An Einstein Analytics Growth, Einstein Analytics Plus, or Einstein Analytics for Financial Services license is required to access full Einstein Analytics capabilities. Consult the chart to see limitations.

Table 9: Client Segmentation Analytics Limitations

<table>
<thead>
<tr>
<th>Capability</th>
<th>Einstein Analytics Growth or Plus; Einstein Analytics for Financial Services</th>
<th>Client Segmentation Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data sources</td>
<td>Salesforce and external data</td>
<td>Salesforce data</td>
</tr>
<tr>
<td>Object support</td>
<td>Standard and custom objects</td>
<td>Standard and custom objects</td>
</tr>
<tr>
<td>Data volume</td>
<td>1 billion rows to start</td>
<td>10 million rows</td>
</tr>
<tr>
<td>Can customize existing dashboards?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Can create dashboards?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Can customize existing datasets?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Can create datasets?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Can create custom Analytics apps?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports Einstein Discovery and Community Cloud integration?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports bulk actions and APEX steps?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports Sales Cloud Einstein artificial intelligence?</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Supports Salesforce Inbox?</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Einstein Analytics for Financial Services gives you the same access to Einstein Analytics capabilities as the Einstein Analytics Growth and Plus licenses. Consult this chart to see any limitations.

Table 10: Einstein Analytics for Financial Services Limitations

<table>
<thead>
<tr>
<th>Capability</th>
<th>Einstein Analytics Growth or Plus; Einstein Analytics for Financial Services</th>
</tr>
</thead>
<tbody>
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### Communities Limitations

- Partner Communities, Customer Communities Plus (CCP), or Customer Communities licenses required. Community Cloud license restrictions and limitations apply.
- Customer Communities are certified only for read access.
- For advanced sharing use cases (for example, sharing financial account records across multiple owners), Partner Communities or CCP licenses are required.
- CCP licenses are limited to 800,000 maximum users per Financial Services Cloud org, irrespective of how many communities the org has.
- Manual provisioning must be completed in Salesforce Classic.
- There is a known limitation in Financial Services Cloud wherein the guest self-registration fails if the org enforces private sharing setting on account and contact and owner is changed on the account.
- Other provisioning methods are not officially supported.
- Financial Services Cloud components are not compatible with Lightning Out.
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