Financial Services Cloud Quick Start

Salesforce, Spring ’23

@salesforcedocs
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GET READY TO USE FINANCIAL SERVICES CLOUD

To start using Financial Services Cloud, complete the tasks in this guide.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Note: When creating custom fields or objects, don't use the same API names as any packaged objects or fields. If you use the same names, the custom fields or objects can interfere with flows, processes, and triggers in Financial Services Cloud.

Check Whether You're Set Up for Financial Services Cloud

Check that you have a Financial Services Cloud trial org and are ready to start.

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.

Financial Services Cloud Permission Set Licenses

Permission set licenses incrementally entitle users to access features that aren't included in their user licenses. Users can be assigned any number of permission set licenses. Financial Services Cloud makes a number of permission sets licenses available.

Schedule Data Refreshes for the Client Segmentation App

To take advantage of Client Segmentation App, schedule a daily refresh of your data.

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1. Log in to Salesforce as a Salesforce admin.
2. From the App Launcher, click **View All** and verify that you can see the Welcome app.

Great, you are ready to get started.

If you don't see the Welcome app, refer to the Financial Services Cloud Installation Guide. On your order form, under Product Specific Terms, find the links to the Financial Services Cloud and Tableau CRM for Financial Services Cloud packages to install.

Create Users

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

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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.

User Persona	Permission Sets to Add
Admin	Financial Services Cloud Standard, Advisor Access, and Personal Banker Access
Advisor	Financial Services Cloud Standard and Advisor Access
Personal Banker	Financial Services Cloud Standard and Personal Banker Access
Teller	Financial Services Cloud Basic and Teller Access

Note: You can assign custom permission sets to provide more 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 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 username 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 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 App app.
   c. Click **Permission Set Assignments**, and then click **Edit Assignments**.
   d. Select the Client Segmentation Analytics User permission set.
   e. Click **Add**, then click **Save**.
   f. Repeat these steps for all users who require access to the Client Segmentation App 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.

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Financial Services Cloud Permission Set Licenses

Permission set licenses incrementally entitle users to access features that aren't included in their user licenses. Users can be assigned any number of permission set licenses. Financial Services Cloud makes a number of permission sets licenses available.

Permission Set License	Description
Financial Services Cloud Basic	Enables user access to a permission set license with contractual restrictions for Financial Services Cloud. Use this permission set license to grant restricted access to users like tellers.
Financial Services Cloud Standard	Enables user access to Lightning components and the standard version of Financial Services Cloud. Use this permission set license to enable access to users like advisors and personal bankers.
Financial Services Cloud Extension	Enables user access to Lightning components and the extended version of Financial Services Cloud. Includes Financial Services Cloud features released in Summer '20 and later. Includes access to Actionable Relationship Center, Branch Management, and Compliant Data Sharing.
FSC Insurance	Enables user access to the Access Insurance Lightning Components, Access Insurance Objects, and Access Life Events or Business Milestone Component permissions. Use this permission set license to enable access to users like agents or producers.
Action Plans	Enables user access to the Action Plans feature and read access to Action Plan Template and Action Plan objects.
Client Segmentation	Enables user access to Download Analytics Data, Install Analytics Templated Apps, Manage Analytics Templated Apps, and Use Analytics templated Apps permissions.

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Permission Set License	Description
Document Checklist	Enables user access to the Document Checklist feature in Financial Services Cloud.
Mortgage	Enables user access to the Mortgage feature in Financial Services Cloud. Use this permission set license to enable access to users like loan officers and underwriters.
Financial Services Cloud Foundations	Enables user access to Financial Services Cloud Foundations features. Grants access to record alerts.

Experience Cloud Permission Sets

Permission Set License	Description
Customer Community for Financial Services	Allows the customer community user to access Financial Services Cloud features.
Customer Community for Financial Services - Login	Allows the login-based customer community user to access Financial Services Cloud features.
Customer Community Plus for Financial Services	Allows the customer community plus user to access Financial Services Cloud features.
Customer Community Plus for Financial Services - Login	Allows the login-based customer community plus user to access Financial Services Cloud features.
External Apps for Financial Services	Allows the external apps user to access Financial Services Cloud features.
External Apps for Financial Services - Login	Allows the login based external apps user to access Financial Services Cloud features.

Note: When assigning a Financial Services Cloud Experience Cloud License to a user, select the license that matches the user's Experience Cloud License. For example, if a user has a Customer Community Plus permission set, assign the user Customer Community Plus for Financial Services permission set.

Schedule Data Refreshes for the Client Segmentation App

EDITIONS

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To take advantage of Client Segmentation App, schedule a daily refresh of your data.

To schedule your app, see Schedule Data Refresh for a CRM Analytics App. Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

SEE ALSO:

Analytics Glossary