Financial Services Cloud Upgrade Guide

Salesforce, Spring ’23

@salesforcedocs

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CONTENTS

POST-UPGRADE TASKS

Financial Services Cloud Spring '21 is now available. These features are optional.

This upgrade guide is being retired in '21.

To see new Financial Services Cloud , see What's New in Spring '21 in the Financial Services Cloud Administrator Guide or Financial Services Cloud in the Salesforce Spring '21 Release Notes.

Don't forget to update your bookmarks!

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Interaction Summaries

Capture and share interaction summaries. Help bankers and financial advisors build and deepen customer relationships with the interaction summaries data model and Lightning components. Your users can manage every aspect of client and partner interactions and take advantage of structured note-taking and compliant, role-based data sharing options. When you add the Interaction Summaries component to the home or account page, they can create interaction summaries linked with interactions. And by adding the Interaction Attendees component to the interaction summary or interaction page, they can easily view and add attendees.

Insurance for Financial Services Cloud

With the new Set Policy Types Order option on the Policy component, keep the most popular or frequently used policy types at the top of the list. And you can now change the default title of the Policy component to a custom title that best indicates the information you choose to display.

Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine

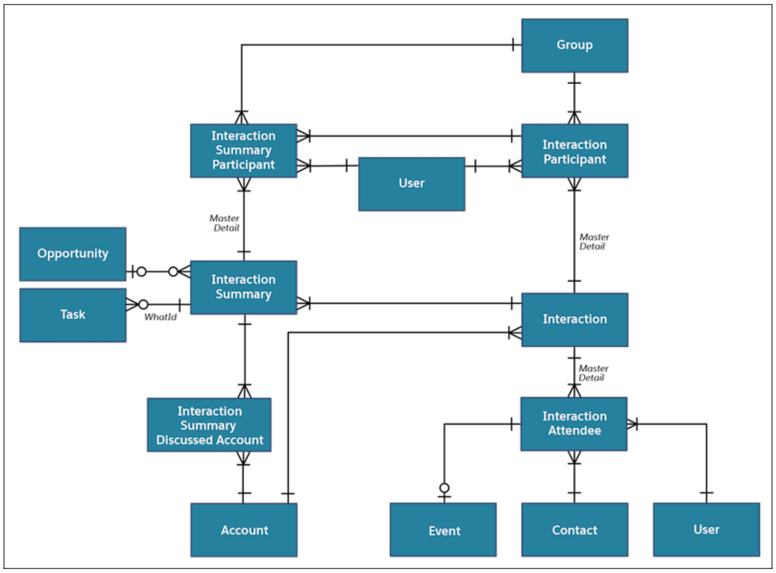
Switch to the enhanced Rollup-by-Lookup (RBL) framework and use the superior processing power of CRM Analytics for faster calculation of RBL rules. The RBL framework lets you convert your existing RBL rules into Data Processing Engine definitions. These high-performance definitions significantly reduce the processing time to aggregate financial information. With Data Processing Engine, you have greater flexibility when defining or modifying RBL rules. For example, you can add multiple data sources, define joins and appends, and add formulas to your rules.

Interaction Summaries

Capture and share interaction summaries. Help bankers and financial advisors build and deepen customer relationships with the interaction summaries data model and Lightning components. Your users can manage every aspect of client and partner interactions and take advantage of structured note-taking and compliant, role-based data sharing options. When you add the Interaction Summaries component to the home or account page, they can create interaction summaries linked with interactions. And by adding the Interaction Attendees component to the interaction summary or interaction page, they can easily view and add attendees.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.



Enable and Configure Interaction Summaries

To enable the interaction summaries feature in your Salesforce org, enable the Interaction Summary setting. Add the Interaction Summaries Lightning component to the home or account page. On the account page, the Interaction Summaries component shows all interaction summaries for that account. On the Home page, it shows interaction summaries for all accounts that the banker has access to. Next, add the Interaction Attendees Lightning component to the interaction summary or interaction page.

Configure Sharing Settings for Interaction and Interaction Summaries

Give your users access to interaction and interaction summaries using existing Salesforce data sharing features such as organization-wide defaults, role hierarchy, and sharing rules. Like all other standard objects, by default, the Grant Access Using Hierarchies option is enabled for the Interaction and Interaction Summary objects. And you can't disable this option from the Organization-Wide Defaults list on the Sharing Settings page. As a result, the users in a role hierarchy have access to interaction and interaction summaries for all users that are below them in the role hierarchy. To prevent users from gaining automatic access to interaction and interaction summaries owned by or shared with their subordinates in the hierarchy, disable the Role-Hierarchy-Based Sharing for Interaction Summaries setting. This action disables the Grant Access Using Hierarchies option for the Interaction and Interaction Summary objects. To configure advanced, compliant data sharing rules for interaction and interaction summaries, enable compliant data sharing for the Interaction and Interaction Summary objects respectively.

Work with Interaction Summaries

When creating an interaction summary, bankers and financial advisors can take detailed meeting notes, specify the confidentiality level of the notes, and add action items or next steps. They can share notes that contain confidential information only with relevant stakeholders to maintain compliance. Before their next meeting, they can quickly search or filter interaction summaries to find and review past interaction summaries and be better prepared for the meeting. They can also take advantage of the support for Interaction Summaries component on mobile devices to create, update, or search interaction summaries on the go.

Sync Interactions with Einstein Activity Capture

Keep interactions data in Salesforce up to date, and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

Enable and Configure Interaction Summaries

To enable the interaction summaries feature in your Salesforce org, enable the Interaction Summary setting. Add the Interaction Summaries Lightning component to the home or account page. On the account page, the Interaction Summaries component shows all interaction summaries for that account. On the Home page, it shows interaction summaries for all accounts that the banker has access to. Next, add the Interaction Attendees Lightning component to the interaction summary or interaction page.

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To enable and configure interaction summaries:

- Financial Services Cloud Extension permission set

  AND

  Customize Application

1. Enable the Interaction Summary setting.
   a. From Setup, in the Quick Find box, enter `Interaction Summary`, and then select **Interaction Summary Settings**.
   b. Enable **Interaction Summary**.
2. Add the Interaction Summaries component to the home page or any object record page.
   a. On the home page or the object record page, click the Setup icon, and select **Edit Page**.
   b. Drag the Interaction Summaries component to the page.
   c. Select a value from the **Lookup Field** dropdown menu.

      The component uses the Lookup Field value to populate the interaction summary records on the component.

      Note: For Home page, the component ignores the lookup field value and shows all records that a user can access. Before you add the component and configure the Lookup Field, create a lookup from the Interaction Summary object to the required object. The values in the Lookup Field dropdown menu depend on the record page that you're editing.

   d. Save your changes.
3. Add the Interaction Attendees component to the interaction summary or interaction page.
   a. On the interaction summary or interaction record page, click the Setup icon, and select **Edit Page**.
   b. Drag the Interaction Attendees component to the page or to a tab on the page.
   c. Save your changes.
4. Add the Account Interactions component to the account record page.
   a. From Setup, in the Quick Find box, enter Interaction Summary, and then select Interaction Summary Settings.
   b. Enable **View Account Interaction as Admin**.

      This setting allows you to configure the Account Interactions component and determine whether to show data on the component for everyone with admin privileges.

   c. On the account record page, click the Setup icon, and select **Edit Page**.
   d. Drag the Account Interactions component to the page or to a tab on the page.
   e. Select **View data as an admin**.

      By default, users' access privileges control what data is shown on the component. You can override this default setting so that the component shows everyone the total number of interactions and all interacting users.

      Note: Before you can enable this setting, the View Account Interaction as Admin feature setting must be enabled for Interaction Summaries.

5. Configure related lists for the Interaction object to show all accounts related to an interaction on the Interaction Related Account related list.
   a. From Setup, open **Object Manager**.
   b. In the Quick Find box, enter `Interaction`, and then select **Interaction**.
   c. Click **Page Layouts**, and then select **Interaction Layout**.
   d. On the palette, select **Related Lists**.
   e. Drag the **Interaction Related Account** from the object palette to the Related Lists container.
   f. Under Related Lists, double-click the **Interaction Related Account** related list or click the wrench icon ( ).
   g. Under Columns, select the 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.
   h. Click **OK**. Your changes aren't saved until you save the page layout.
   i. Save the page layout.

SEE ALSO:

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Configure Sharing Settings for Interaction and Interaction Summaries

Give your users access to interaction and interaction summaries using existing Salesforce data sharing features such as organization-wide defaults, role hierarchy, and sharing rules. Like all other standard objects, by default, the Grant Access Using Hierarchies option is enabled for the Interaction and Interaction Summary objects. And you can't disable this option from the Organization-Wide Defaults list on the Sharing Settings page. As a result, the users in a role hierarchy have access to interaction and interaction summaries for all users that are below them in the role hierarchy. To prevent users from gaining automatic access to interaction and interaction summaries owned by or shared with their subordinates in the hierarchy, disable the Role-Hierarchy-Based Sharing for Interaction Summaries setting. This action disables the Grant Access Using Hierarchies option for the Interaction and Interaction Summary objects. To configure advanced, compliant data sharing rules for interaction and interaction summaries, enable compliant data sharing for the Interaction and Interaction Summary objects respectively.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To configure sharing settings for interaction and interaction summaries:

- Financial Services Cloud Extension permission set

  AND

  Customize Application

1. To prevent users from gaining automatic access to interactions or interaction summaries owned by or shared with their subordinates in a role hierarchy, disable the Role-Hierarchy-Based Sharing for Interaction Summaries setting.
   a. From Setup, in the Quick Find box, enter `Interaction Summary`, and then select **Interaction Summary Settings**.
   b. Disable **Role-Hierarchy-Based Sharing for Interaction Summaries**.
   c. Disable **Role-Hierarchy-Based Sharing for Interactions**.

   Note: These settings are available only if the Interaction Summary setting is enabled.

2. Enable compliant data sharing for the Interaction and Interaction Summary objects.
   a. From Setup, in the Quick Find box, enter `Compliant Data Sharing`, and then select **Object Enablement Settings**.
   b. Enable **Interaction**.

To share an interaction and to access the Interaction Participant object, ensure that compliant data sharing is enabled for the Interaction object.

c. Enable **Interaction Summary**.

To share an interaction summary and to access the Interaction Summary Participant object, ensure that compliant data sharing is enabled for the Interaction Summary object.

SEE ALSO:

Sharing Settings

Compliant Data Sharing

Work with Interaction Summaries

When creating an interaction summary, bankers and financial advisors can take detailed meeting notes, specify the confidentiality level of the notes, and add action items or next steps. They can share notes that contain confidential information only with relevant stakeholders to maintain compliance. Before their next meeting, they can quickly search or filter interaction summaries to find and review past interaction summaries and be better prepared for the meeting. They can also take advantage of the support for Interaction Summaries component on mobile devices to create, update, or search interaction summaries on the go.

EDITIONS

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Create an Interaction

Create an interaction to capture a meeting with a client or partner.

Prevent Duplicate Interaction Records

Use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

Add Attendees to an Interaction

You can add one or more users or contacts as attendees to an interaction.

View Account Interactions and Key Contacts

See at a glance the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Explore Accounts Associated With an Interaction

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account. For example, whether the account is Primary, Legal, or Audit.

Add Interest Tags to Interaction Summaries

Your users can add Interest Tags to Interaction Summaries. Instead of sifting through meeting notes to find relevant interactions, your users can filter interaction summaries by interest tags to quickly find the required interactions.

Share an Interaction

You can share a record from the Interaction Participants related list or by using the Manage Participants component.

Create an Interaction Summary

Capture the details of an interaction in an interaction summary. When creating an interaction summary, you can take detailed meeting notes, specify the confidentiality level of the notes, and add action items or next steps. You can also add a related record such as an opportunity or a financial deal associated with the interaction.

Share an Interaction Summary

You can share a record from the Interaction Summary Participants related list or use the Manage Participants component.

Search Interaction Summaries

Add the Interaction Summaries component to the account page so that bankers and financial advisors can search for interaction summaries. They can search for a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

Create an Interaction

Create an interaction to capture a meeting with a client or partner.

1. From the App Launcher, select **Interactions**.
2. Change the list view to **All Interactions**.
3. Click **New**.
4. Enter a name for the interaction. For example, enter `Meeting with clients`.
5. Select the account of the client or partner who you interacted with.
6. Select the interaction start and date times, interaction type, and the location of interaction.
7. Save your changes.

EDITIONS

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USER PERMISSIONS

To create an interaction:

- Financial Services Cloud Extension permission set

Prevent Duplicate Interaction Records

Use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

SEE ALSO:

Salesforce Help Customize Duplicate Management

EDITIONS

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Add Attendees to an Interaction

You can add one or more users or contacts as attendees to an interaction.

Ensure that the Interaction Attendees Lightning component is added to the interaction record page.

1. On an interaction record page, on the Interaction Attendees component, click **Add Interaction Attendees**.

   Note: If you haven't already created interaction attendees, click **New** to create and add one at the same time.

2. From the Attendee Type list, select **Internal** or **External**.
3. From the Individual list, select **User** or **Contact**, and then select a user or contact ID.
4. Click **Add**.
5. To add more users or contacts as attendees, repeat steps 2 through 4.
6. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To add attendees to an interaction:

- Financial Services Cloud Extension permission set

SEE ALSO:

Enable and Configure Interaction Summaries

View Account Interactions and Key Contacts

See at a glance the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Ensure that the Account Interactions Lightning component is added to the account record page.

1. On the account record page, on the Account Interactions component, select a contact.
2. On the Interactions tab, view details about interactions with that contact, such as when the interactions occurred and how many attendees were involved.
3. To view details about the users interacting with that contact, click the **Interacting Users** tab.

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USER PERMISSIONS

To view account interactions and key contacts:

- Financial Services Cloud Extension permission set

Explore Accounts Associated With an Interaction

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account. For example, whether the account is Primary, Legal, or Audit.

Your admin must add the Interaction Related Account related list to the Interaction record page layout. After the related list is configured,

When you modify the interaction attendee details for an interaction, Salesforce automatically updates the Interaction Related Account related list. For example, if you remove an attendee from an interaction, the account details of that attendee is automatically removed from the Interaction Related Account related list.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To explore accounts related to an interaction:

- Financial Services Cloud Extension permission set

1. From the App launcher, find and select **Interactions**.
2. From the Interactions list view, select the interaction for which you want to view all accounts related to that interaction.
3. Click the **Related** tab and on the **Interaction Related Account** related list you can view all accounts related to that interaction.

SEE ALSO:

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

InteractionRelatedAccount (can be outdated or unavailable during release preview)

Add Interest Tags to Interaction Summaries

Your users can add Interest Tags to Interaction Summaries. Instead of sifting through meeting notes to find relevant interactions, your users can filter interaction summaries by interest tags to quickly find the required interactions.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Interest Tags:

- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

Enable Topics for Objects

Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

Assign Interest Tags Permissions to Users

Give users access to use interest tags by assigning permission sets.

Enable Interest Tags

Enable the setting that turns on interest tags.

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

Add the Interest Tags Component to Interaction Summary Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

Assign Interest Tags to Interaction Summaries

On the interaction summary record pages where you added the Interest Tags component, your users can assign interest tags to capture client needs, interests, and prospect opportunities.

Assign Interest Tags by Using the Interaction Summaries Component

When you add the Interaction Summaries component to the account record page or home page, your users can assign interest tags to interaction summary records from the component itself. To quickly find the required interactions, users can also filter interaction summaries by interest tags.

Enable Topics for Objects

Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Interest Tags:

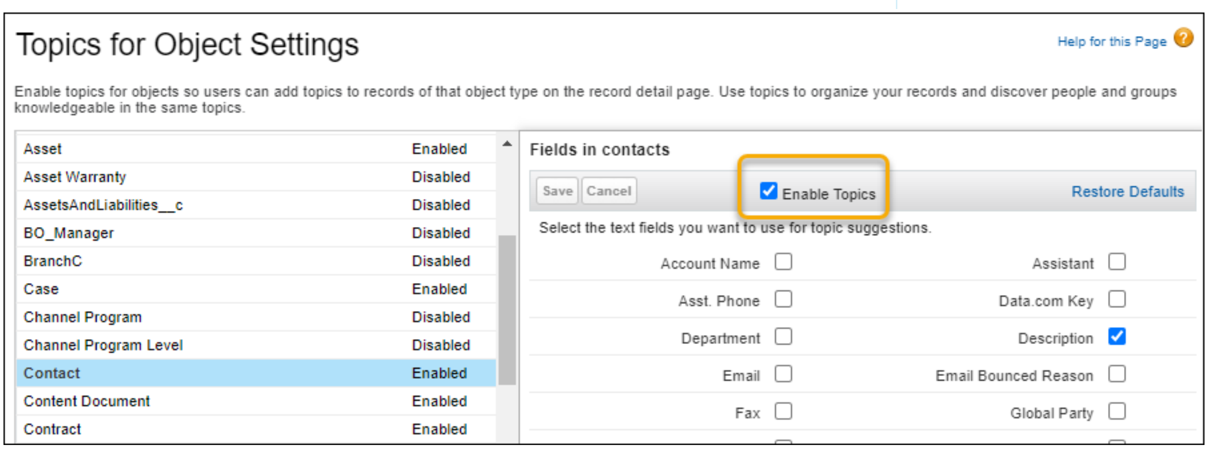
- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

Note: The Access Interest Tags for Financial Services Cloud permission is enabled by default with the Financial Services Cloud Extension permission set.

1. Enable Topics for all the Financial Services Cloud objects that will show the Interest Tags component.
   a. From Setup, in the Quick Find box, enter `Topics`, and then select **Topics for Objects**.
   b. Select the object, and then select **Enable Topics**.
   c. Repeat this step for other objects.



2. Assign topics permissions to profiles.
   a. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
   b. Click the profile you're editing.

c. Click **Edit**.

d. In General User Permissions, select the appropriate permissions.

- Assign Topics: Let users add interest tags to records.
- Create Topics: Let users create interest tags.
- Delete Topics: Let users delete interest tags.
- Edit Topics: Let users edit interest tags.

Note: If you want to restrict who has access to create, edit, and delete interest tags and tag categories, give most of your users the Assign Topics permission only.

e. Save your changes.

Assign Interest Tags Permissions to Users

EDITIONS

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USER PERMISSIONS

To use Interest Tags:

- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

Give users access to use interest tags by assigning permission sets.

1. Verify and update profile permissions for Interest Tags.
   a. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
   b. Click the profile that you're editing.
   c. Click **Edit**.

      Use the same Topics object settings for Interest Tags, Tag Category Assignments, and Tag Categories objects.
   d. In Tab Settings, set tab visibility for Interest Tags, Tag Categories, and Tag Category Assignments.
   e. In General User Permissions, set permissions for Interest Tags, Tag Categories, and Tag Category Assignments.

      If you want to restrict who can edit the names of Interest Tags and Tag Categories, grant most of your users View All and Read access.
   f. Save your changes.
   g. Repeat these steps for other profiles.
2. Create a permission set that gives access to Interest Tags.
   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
   b. Click **Clone** next to the Financial Services Cloud Extension permission set.
   c. Enter a label, such as `FSC with Interest Tags`.
   d. Clear the API name field and then press Tab to continue to the next field, so that the API name auto-populates.
   e. Optionally, edit the Description field.
   f. Click **Save**.
   g. In the Permission Sets list, click the name of the newly created permission set.
   h. Click the **System Permissions** link.
   i. Click **Edit**.
   j. Select the **Access Interest Tags for Financial Services Cloud** permission.

k. Save your changes.

3. Assign the permission set to users.
   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
   b. Click the newly created permission set **FSC with Interest Tag**.
   c. Click **Manage Assignments**, and then click **Add Assignments**.
   d. Select each user that needs Interest Tags access, and then click **Assign**.

Enable Interest Tags

Enable the setting that turns on interest tags.

1. From Setup, in the Quick Find box, enter `Interest Tags`, and then select **Interest Tags**.
2. Turn on Interest Tags.

EDITIONS

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

USER PERMISSIONS

To use Interest Tags:

- Financial Services Cloud Extension permission set

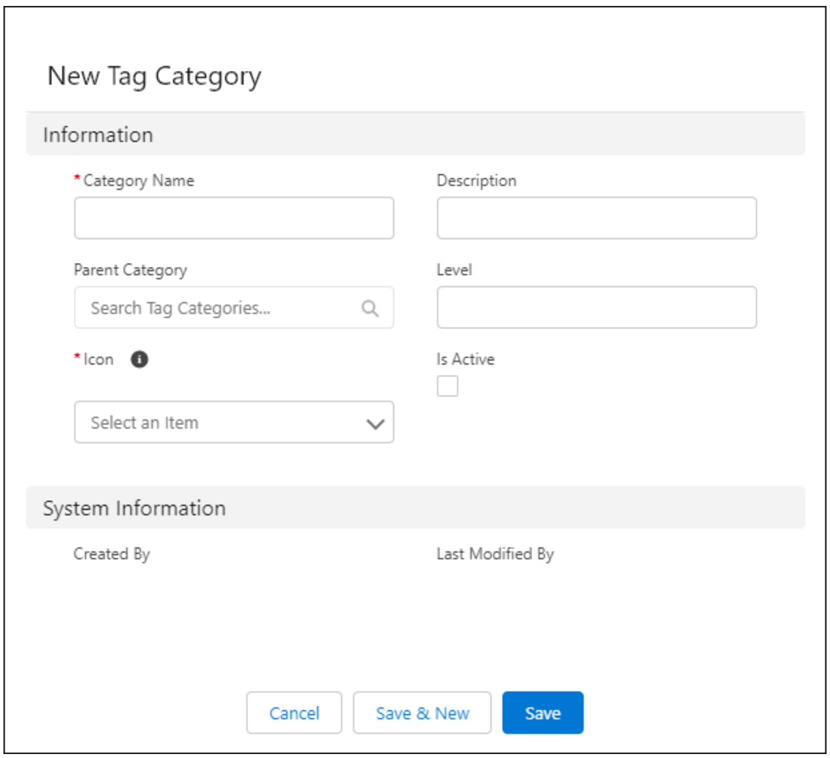
  or

  Financial Services Cloud Foundations permission set

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

1. Select **Tag Categories** from the navigation bar.
2. In the Tag Categories list view, click **New**.
3. Enter a Category Name, such as `Sports`.
4. Enter a Description.
5. If you're creating a second-level or third-level tag category, select a Parent Category.
6. For Level, enter `1`, `2`, or `3`.
7. Select an Icon to visually represent the tag category.
8. To activate the new category, select **Is Active** and then click **Save**.



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USER PERMISSIONS

To use Interest Tags:

- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

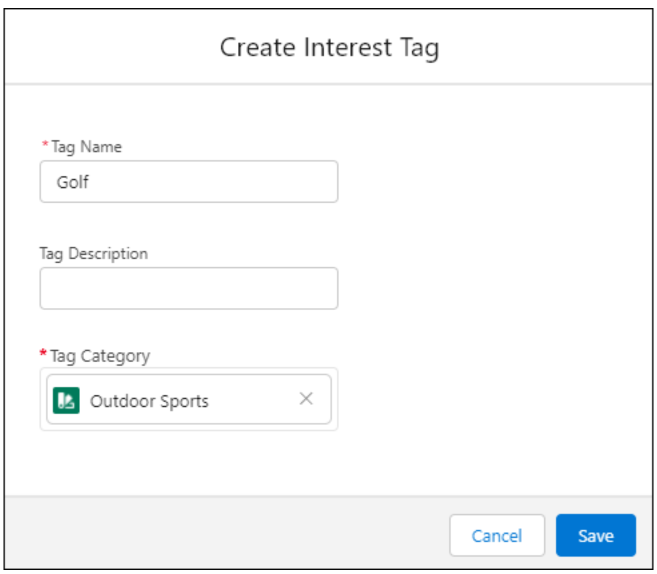
Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

Important:

- Make sure that you've created tag categories before you create interest tags. The Tag Category field is required when creating an interest tag record.
- If your org is using Topics, you can't have interest tag names identical to topic tag names. Check for existing topic tags by creating a report. We recommend either editing or removing topic tag names that you want to use as interest tags. Alternatively, avoid using Topics entirely if you're also using Interest Tags.

1. Select **Interest Tags** from the navigation bar.
2. In the Interest Tags list view, click **New**.
3. Enter a Tag Name and Description.
4. Select a Tag Category and click **Save**.



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USER PERMISSIONS

To use Interest Tags:

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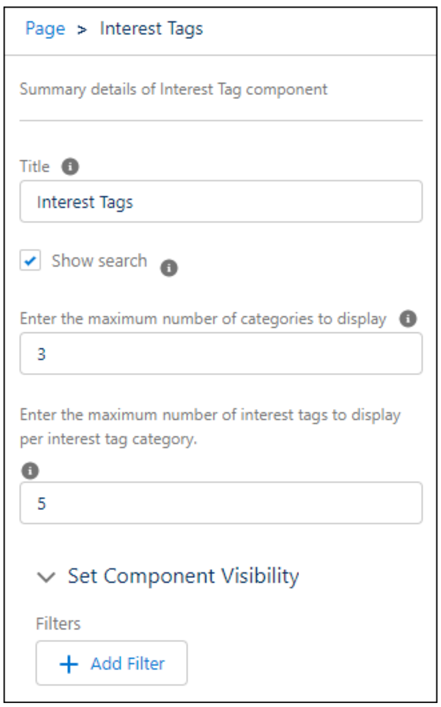
  or

  Financial Services Cloud Foundations permission set

Add the Interest Tags Component to Interaction Summary Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

1. In Lightning App Builder, edit the Interaction Summary record page, drag **Interest Tags** from the Components panel to the Lightning page canvas, and then position it where you want it to appear.
2. In the properties panel:
    a. Enter a title.
    b. To let users search for interest tags, select **Show Search**.
    c. Enter the maximum number of tag categories that you want to show in the component. Users can expand the list to view more tag categories.
    d. Enter the maximum number of interest tags that you want to show in the component. Users can expand the list to view more tag categories.



    e. Save your changes.
3. If your page is new, activate the page.

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USER PERMISSIONS

To add the Interest Tags component:

- Financial Services Cloud Extension permission set

  OR

  Financial Services Cloud Foundations permission set

  AND

  Customize Application

Assign Interest Tags to Interaction Summaries

On the interaction summary record pages where you added the Interest Tags component, your users can assign interest tags to capture client needs, interests, and prospect opportunities.

1. On the Interest Tags component, click **All Tag Categories**, and then select a tag category by which you want to filter.
2. Enter an interest tag name, and then press Enter to search.
3. To add an interest tag, select the required tag.
   All interest tags that are assigned to the record are organized by tag categories.

EDITIONS

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

USER PERMISSIONS

To assign Interest Tags:

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  or

  Financial Services Cloud Foundations permission set

Assign Interest Tags by Using the Interaction Summaries Component

When you add the Interaction Summaries component to the account record page or home page, your users can assign interest tags to interaction summary records from the component itself. To quickly find the required interactions, users can also filter interaction summaries by interest tags.

1. On the Interaction Summaries component, click the interest tags icon ( ) for the interaction summary record for which you want to assign interest tags.
2. Enter an interest tag name, and then press Enter to search.
3. Select an interest tag to add. All interest tags that are assigned to the record are organized by tag categories.
4. If the tag with the entered name doesn't exist, press Enter to create an interest tag with that name, and then assign it to the interaction summary record
   a. Enter a tag name and description.
   b. Select a tag category.
   c. Save your changes.
      This step assigns the new interest tag to the interaction summary record.
5. To filter interaction summaries by interest tags:
   a. At the upper-right corner of the component, click the filter by interest tag icon ( ).
   b. Search for and select interest tags based on which you want to filter interaction summary records.
   c. Click **Apply**.

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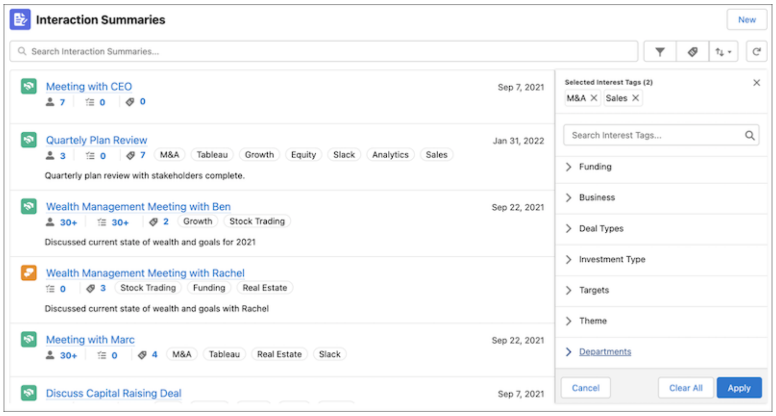


Share an Interaction

You can share a record from the Interaction Participants related list or by using the Manage Participants component.

Share an Interaction from the Interaction Participants Related List
You can share an interaction with a user or a group by adding them as participants to the record from the Interaction Participants related list. With this approach, you can share a record with only one user or a group at a time.

Share an Interaction Using the Manage Participants Component
When you add the new Manage Participant component to an interaction record page, bankers and financial advisors can add multiple users or groups as participants to a record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Share an Interaction from the Interaction Participants Related List

You can share an interaction with a user or a group by adding them as participants to the record from the Interaction Participants related list. With this approach, you can share a record with only one user or a group at a time.

To share an interaction and to access the Interaction Participant object, ensure that compliant data sharing is enabled for the Interaction object.

1. From an interaction record page, on the Interaction Participants related list, click **New**.
2. From the Participant list, search for and select the user or the group that you want to share the interaction with.
3. Select a participant role, enter comments, and select **Active**.
4. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To share an interaction using the Interaction Participants related list:

- Financial Services Cloud Extension permission set

Share an Interaction Using the Manage Participants Component

When you add the new Manage Participant component to an interaction record page, bankers and financial advisors can add multiple users or groups as participants to a record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Ensure that compliant data sharing is enabled for the Interaction object.

1. Add the Manage Participants component to the interaction record page.
   a. On the interaction record page, click the Setup icon.
   b. Select **Edit Page**.
   c. Drag the Manage Participants component onto the page layout.
2. Configure the component, and then select participant types.
   a. Click anywhere on the Manage Participants component to select it.
   b. In the properties pane, under Participant Types for Suggestion List, click **Select**.
   c. Move the required participant types to the Selected list, and then click **OK**.
   d. Save your changes.

   The Manage Participant component supports Account participants, Interaction Attendees, Financial Deal participants, and Opportunity participants as suggestions to share interaction records. Users or groups from these participant types appear as suggestions.
3. Add users or groups as participants.
   a. From an interaction record page, on the Manage Participants component, click **Add**.
   b. Search for and select users or groups, or select them from the Suggested Users or Groups section.
   c. Click **Next**.
   d. Select a participant role for every user or group, enter comments, and then select **Active**.
   e. Click **Finish**.
   f. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To share an interaction using the Manage Participants component:
- Financial Services Cloud Extension permission set

Create an Interaction Summary

Capture the details of an interaction in an interaction summary. When creating an interaction summary, you can take detailed meeting notes, specify the confidentiality level of the notes, and add action items or next steps. You can also add a related record such as an opportunity or a financial deal associated with the interaction.

Ensure that the Interaction Summaries Lightning component is added to the account record page or the home page of your app.

1. On an account record page, on the Interaction Summaries component, click **New**.
2. Enter a title for the interaction summary and select the interaction that you're creating the summary for.
3. Specify the other details, such as interaction purpose, confidentiality, status, meeting notes, and next steps.
4. Select the related opportunity, partner account, and offering, if any.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To create an interaction summary:
- Financial Services Cloud Extension permission set

5. Save your changes.

SEE ALSO:

Enable and Configure Interaction Summaries

Share an Interaction Summary

You can share a record from the Interaction Summary Participants related list or use the Manage Participants component.

Share an Interaction Summary from the Interaction Summary Participants Related List

You can share an interaction summary record with a user or a group by adding them as participants to the record from the Interaction Summary Participants related list. With this approach, you can share a record with only one user or a group at a time.

Share an Interaction Summary Using the Manage Participants Component

When you add the Manage Participant component to an interaction summary record page, bankers and financial advisors can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Share an Interaction Summary from the Interaction Summary Participants Related List

You can share an interaction summary record with a user or a group by adding them as participants to the record from the Interaction Summary Participants related list. With this approach, you can share a record with only one user or a group at a time.

To share an Interaction Summary and to access the Interaction Summary Participant object, ensure that compliant data sharing is enabled for the Interaction Summary object.

1. From an interaction summary record page, on the Interaction Summary Participants related list, click **New**.
2. From the Participant list, search for and select the user or the group that you want to share the interaction summary with.
3. Select a participant role, enter comments, and select **Active**.
4. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To share an interaction summary from the Interaction Summary Participants related list:

- Financial Services Cloud Extension permission set

Share an Interaction Summary Using the Manage Participants Component

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To share an interaction summary using the Manage Participants component:

- Financial Services Cloud Extension permission set

When you add the Manage Participant component to an interaction summary record page, bankers and financial advisors can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Ensure that compliant data sharing is enabled for the Interaction Summary object.

1. Add the Manage Participants component to the interaction summary record page.
   a. On the interaction summary record page, click the Setup icon.
   b. Select **Edit Page**.
   c. Drag the Manage Participants component onto the page layout.
2. Configure the component, and then select participant types.
   a. Click anywhere on the Manage Participants component to select it.
   b. In the properties pane, under Participant Types for Suggestion List, click **Select**.
   c. Move the required participant types to the Selected list, and then click **OK**.
   d. Save your changes.

   The Manage Participant component supports Account participants, Partner Account participants, Interaction participants, Interaction Attendees, Financial Deal participants, and Opportunity participants as suggestions to share interaction summary records. Users or groups from these types appear as suggestions.
3. Add users or groups as participants.
   a. On an interaction summary record page, on the Manage Participants component, click **Add**.
   b. Search for and select users or groups, or select them from the Suggested Users or Groups section.
   c. Click **Next**.
   d. Select a participant role for every user or group, enter comments, and then select **Active**.
   e. Click **Finish**.
   f. Save your changes.

Search Interaction Summaries

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have Financial Services Cloud enabled.

USER PERMISSIONS

To search interaction summaries:

- Financial Services Cloud Extension permission set

Add the Interaction Summaries component to the account page so that bankers and financial advisors can search for interaction summaries. They can search for a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

The Interaction Summaries component helps bankers and financial advisors to quickly find and review past interaction summaries. The component supports the use of the wildcard character asterisk (*) in a search query, such as `Joe Sm*`. The component also supports infinite scroll to load interaction summaries.

The search engine looks for matches to the search term across a maximum of 2,000 records. If you're searching from more than 2,000 records, we recommend that you use the filters in the Interaction Summary component for more selective search results.

1. To access interaction summary records, click the **Show More** link at the bottom of the component.
2. Preview interaction attendees and open activities.
   a. To preview interaction attendees for an interaction summary, click the interaction attendees icon ( ).
   b. To preview open activities related to an interaction summary, click the open activities icon ( ).

      Note: The previews display only 30 records. To view all records, click **View All**.
3. On the Interaction Summaries component, click the sort icon ( ).`

   You can sort interaction summary records based on the creation date, the interaction start date and time, or the last modified date.
4. Select a sort option.
5. Choose how to populate interaction summaries.

   You can also choose how to populate the interaction summary records—on the Interaction Summaries component—by selecting the lookup field that the component uses to populate records.
   a. On the record page, click the Setup icon.
   b. Select **Edit Page**.
   c. Click anywhere on the Interaction Summaries component to select it.
   d. In the properties pane, select a value from the Lookup Field dropdown menu.

      The values in the dropdown menu depend on the record page that you're editing.

      Note: For the Home page layout, the component always shows a list of interaction summaries that a user can access. You can't override this behavior for the Home page.
6. Show or hide the New button to create interaction summaries.

   By default, the component shows a New button that your users can click to create interaction summaries from the component itself. You can configure the component to hide the New button.
   a. On the record page, click the Setup icon.
   b. Select **Edit Page**.
   c. Click anywhere on the Interaction Summaries component to select it.

d. In the properties pane, select **Hide New button**.

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Setting Up Einstein Activity Capture for Financial Services Cloud

- If you're already syncing events using Einstein Activity Capture, then before enabling Einstein Activity Capture for Financial Services Cloud in your Salesforce org, you must either:
  - Reset your Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then set up a new Einstein Activity Capture configuration for syncing interactions.
  - Turn off the Event setting in each active Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then turn on the Interaction setting for the configurations.
- To enable Einstein Activity Capture for Financial Services Cloud, from the Einstein Activity Capture settings page, turn off **Activity Metrics** and **Activity Dashboard**.

Syncing Events as Interactions and Interaction Attendees

- Interactions are synced and records are created in Salesforce only when the related events are organized by users who have access to both Einstein Activity Capture and Financial Services Cloud licenses and permissions.
- You can't sync events organized by users who aren't Salesforce users.
- Events synced with Einstein Activity Capture as interaction and interaction attendee records aren't supported on the activity timeline.
- You can create an Einstein Activity Capture configuration to sync events or interactions but not both.
- Syncing recurring events as interactions isn't supported. Event attachments don't sync between Microsoft Exchange or Google and Salesforce.
- The Activity Metrics and Activity dashboards aren't supported when syncing events as interactions in Salesforce.
- Syncing interactions is unidirectional. You can sync events only from connected email and calendar applications to Salesforce but not in the other direction.
- Because syncing is unidirectional, changes to synced records in Salesforce are overwritten the next time you sync those records with Einstein Activity Capture.

General Considerations

- Before activating a configuration with interactions enabled, we recommend preparing interactions that you don't want to sync to Salesforce. See Preparing to Sync Interactions on page 27.
- By default, interactions are synced starting from the date that the user's account is connected to Salesforce. To change this date, you can adjust the Filter by End Date when creating the configuration or later on the configuration's Advanced Settings tab. When editing the value on an existing configuration, the new value doesn't apply to users who already have an account connected.
- If interactions aren't syncing for a specific user, try removing the user from the configuration and then adding the user again. If you're using Microsoft Office 365 with an org-level or service account authentication method, you can test and reset the user.
- Synced interactions are available for Salesforce Reports.
- If there's no contact mapping for an attendee record, only the attendee's email is synced and displayed on the interaction record.

- To view the synced interaction attendee details, add the Interaction Attendee component to an Interaction record page layout.
- To view all accounts participating in the synced interactions on the related list, add the Interaction Related Account related list to an Interaction record page layout. When you remove an attendee from an interaction, the account details related to that attendee are also removed from the Interaction Related Account object.
- You can search synced interaction and interaction attendee records.
- The ownership of synced records is based on Compliant Data Sharing rules.

SEE ALSO:

Sales Productivity: Einstein Activity Capture Considerations (can be outdated or unavailable during release preview)

Sales Productivity: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Enable and Configure Interaction Summaries (can be outdated or unavailable during release preview)

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Sync Interactions with Einstein Activity Capture

Keep interactions data in Salesforce up to date, and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

1. Setup Einstein Activity Capture for Financial Services Cloud

   Review the steps for setting up Einstein Activity Capture for Financial Services Cloud.
2. Interactions and Einstein Activity Capture

   Learn what happens when interactions are enabled in an Einstein Activity Capture configuration.

SEE ALSO:

Sales Productivity: Einstein Activity Capture (can be outdated or unavailable during release preview)

Setup Einstein Activity Capture for Financial Services Cloud

Review the steps for setting up Einstein Activity Capture for Financial Services Cloud.

EDITIONS

Available in: Lightning Experience in **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Before You Get Started

Make sure that Einstein Activity Capture is set up in Salesforce and that you understand how it works with events. Also, review how to set up and work with interaction summaries.

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

Admin Setup for Einstein Activity Capture

Give users access to Einstein Activity Capture. Connect your company's email and calendar applications to Salesforce, and create a configuration that controls how data moves between applications.

End-User Setup for Einstein Activity Capture

Connect your email and calendar accounts to Salesforce so that you can sync events from the connected accounts to Salesforce as interaction and interaction attendee records. Plus, prevent specific interactions from being synced to Salesforce.

Before You Get Started

Make sure that Einstein Activity Capture is set up in Salesforce and that you understand how it works with events. Also, review how to set up and work with interaction summaries.

Before you get started, we recommend these resources.

- Einstein Activity Capture BasicsEinstein Activity Capture ConsiderationsSet Up Einstein Activity CaptureEvents and Einstein and Activity CaptureEnable and Configure Interaction SummariesWork with Interaction Summaries

Einstein Activity Capture supports syncing events and syncing events as interactions with the following differences:

Feature	Syncing Events	Syncing Interactions
Sync direction	Bi-directional	Unidirectional
Recurring Event Sync	Supported	Not supported
Activity Metrics	Supported	Not supported
Activity Timeline	Supported	Interactions synced aren't supported on Activity Timeline
Activity Dashboard	Supported	Not supported
External Organizer Meeting Sync	Supported	Not supported

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Setting Up Einstein Activity Capture for Financial Services Cloud

- If you're already syncing events using Einstein Activity Capture, then before enabling Einstein Activity Capture for Financial Services Cloud in your Salesforce org, you must either:
  - Reset your Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then set up a new Einstein Activity Capture configuration for syncing interactions.
  - Turn off the Event setting in each active Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then turn on the Interaction setting for the configurations.
- To enable Einstein Activity Capture for Financial Services Cloud, from the Einstein Activity Capture settings page, turn off **Activity Metrics** and **Activity Dashboard**.

Syncing Events as Interactions and Interaction Attendees

- Interactions are synced and records are created in Salesforce only when the related events are organized by users who have access to both Einstein Activity Capture and Financial Services Cloud licenses and permissions.
- You can't sync events organized by users who aren't Salesforce users.

- Events synced with Einstein Activity Capture as interaction and interaction attendee records aren't supported on the activity timeline.
- You can create an Einstein Activity Capture configuration to sync events or interactions but not both.
- Syncing recurring events as interactions isn't supported. Event attachments don't sync between Microsoft Exchange or Google and Salesforce.
- The Activity Metrics and Activity dashboards aren't supported when syncing events as interactions in Salesforce.
- Syncing interactions is unidirectional. You can sync events only from connected email and calendar applications to Salesforce but not in the other direction.
- Because syncing is unidirectional, changes to synced records in Salesforce are overwritten the next time you sync those records with Einstein Activity Capture.

General Considerations

- Before activating a configuration with interactions enabled, we recommend preparing interactions that you don't want to sync to Salesforce. See Preparing to Sync Interactions on page 27.
- By default, interactions are synced starting from the date that the user's account is connected to Salesforce. To change this date, you can adjust the Filter by End Date when creating the configuration or later on the configuration's Advanced Settings tab. When editing the value on an existing configuration, the new value doesn't apply to users who already have an account connected.
- If interactions aren't syncing for a specific user, try removing the user from the configuration and then adding the user again. If you're using Microsoft Office 365 with an org-level or service account authentication method, you can test and reset the user.
- Synced interactions are available for Salesforce Reports.
- If there's no contact mapping for an attendee record, only the attendee's email is synced and displayed on the interaction record.
- To view the synced interaction attendee details, add the Interaction Attendee component to an Interaction record page layout.
- To view all accounts participating in the synced interactions on the related list, add the Interaction Related Account related list to an Interaction record page layout. When you remove an attendee from an interaction, the account details related to that attendee are also removed from the Interaction Related Account object.
- You can search synced interaction and interaction attendee records.
- The ownership of synced records is based on Compliant Data Sharing rules.

SEE ALSO:

Sales Productivity: Einstein Activity Capture Considerations (can be outdated or unavailable during release preview)

Sales Productivity: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Enable and Configure Interaction Summaries (can be outdated or unavailable during release preview)

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Admin Setup for Einstein Activity Capture

Give users access to Einstein Activity Capture. Connect your company's email and calendar applications to Salesforce, and create a configuration that controls how data moves between applications.

1. Enable Einstein Activity Capture for Financial Services Cloud
   Give users access to Einstein Activity Capture so that they can connect their email and calendar applications to Salesforce.

2. Create a Configuration to Sync Events as Interactions

   Einstein Activity Capture configurations define how data flows from the connected accounts to Salesforce. Review the default sync settings and change the settings, if necessary. After you have enabled Einstein Activity Capture for Financial Services Cloud, all references to events in the configuration UI, depending on the context, means interactions.

Enable Einstein Activity Capture for Financial Services Cloud

Give users access to Einstein Activity Capture so that they can connect their email and calendar applications to Salesforce.

Before you enable Einstein Activity Capture for Financial Services Cloud, ensure that you've enabled the Interaction Summary option in Salesforce. See Enable and Configure Interaction Summaries on page 3.

1. From Setup, in the Quick Find box, enter `Interaction Summary`.
2. Under Financial Services, select **Interaction Summary Settings**.
3. Enable **Einstein Activity Capture for Financial Services Cloud**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

USER PERMISSIONS

To enable and configure interaction summaries:

- Financial Services Cloud Extension permission set

  AND

  Customize Application

Create a Configuration to Sync Events as Interactions

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

USER PERMISSIONS

To create or edit an Einstein Activity Capture configuration:
- View Setup and Configurations

  AND

  Customize Application

  AND

  Modify All Data

Einstein Activity Capture configurations define how data flows from the connected accounts to Salesforce. Review the default sync settings and change the settings, if necessary. After you have enabled Einstein Activity Capture for Financial Services Cloud, all references to events in the configuration UI, depending on the context, means interactions.

1. From Setup, in the Quick Find box, enter `Einstein Activity Capture`, and then select **Settings**.

   If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you're moving from Lightning Sync or you already use Einstein Activity Capture but it's your first time creating a configuration, click **Add Contact and Interaction Sync** and follow the guided steps.

2. On the Configuration tab, click **New Configuration**.
3. Give the configuration a name and description.
4. Review the interaction settings, and then click **Next**.
5. Add users and profiles to the configuration, and then click **Next**.

SEE ALSO:

Sales Productivity: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

End-User Setup for Einstein Activity Capture

Connect your email and calendar accounts to Salesforce so that you can sync events from the connected accounts to Salesforce as interaction and interaction attendee records. Plus, prevent specific interactions from being synced to Salesforce.

1. Connect Your Email and Calendar Applications to Salesforce

   Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce.

2. Preparing to Sync Interactions with Einstein Activity Capture

   If your Salesforce admin configured Einstein Activity Capture to sync interactions to Salesforce, make sure that it works the way you want.

Connect Your Email and Calendar Applications to Salesforce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce.

SEE ALSO:

Sales Productivity: Admin Setup for Einstein Activity Capture (can be outdated or unavailable during release preview)

Preparing to Sync Interactions with Einstein Activity Capture

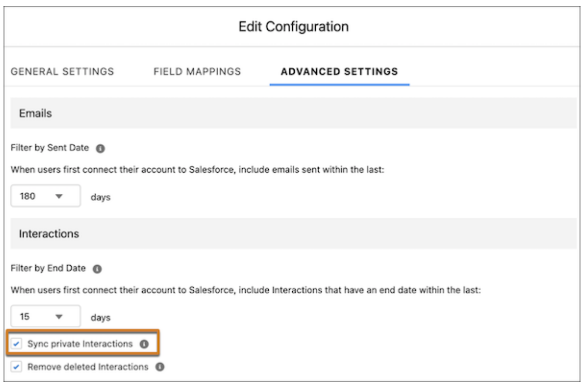
If your Salesforce admin configured Einstein Activity Capture to sync interactions to Salesforce, make sure that it works the way you want.

Available in: Lightning Experience in **Enterprise** and **Unlimited** Editions where Financial Services Cloud and Einstein Activity Capture.

Prepare events that you don't want to sync as interactions before your admin turns on your Einstein Activity Capture configuration. You can manage which events sync at any time. To remove synced interactions from Salesforce, manually delete them.

To prevent personal events from syncing from your Google or Microsoft calendar to Salesforce as interaction and interaction attendee records, create a separate calendar. Einstein Activity Capture syncs only your default calendar to Salesforce.

When Salesforce admins define sync settings in Einstein Activity Capture configurations, they choose whether to sync users' private interactions. Users can also prevent interactions from syncing by assigning the private option to events from their calendar applications.



Interactions and Einstein Activity Capture

Learn what happens when interactions are enabled in an Einstein Activity Capture configuration.

How Interactions Sync with Einstein Activity Capture

Einstein Activity Capture matches your Microsoft or Google events with relevant Salesforce interactions and interactions attendees. Learn which interactions are synced and how often.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Which Interactions Sync and How Are They Matched?

Einstein Activity Capture checks whether an interaction with the same subject, date, and start and end times exists in both Salesforce and Microsoft or Google. If interactions match, they're mapped to each other and synced to Salesforce. If no interactions match, a new interaction is created, and the two are mapped to sync unmatched interactions to Salesforce.

Because recent interactions are the most relevant to you, after your Salesforce admin initiates sync, Einstein Activity Capture attempts to match:

- New Salesforce interactions after you create them or existing Salesforce interactions after you update them
- New and existing Microsoft or Google interactions that fall within the filter and sync settings set by your admin

Interaction sync can take a day or more. Some factors can impact sync wait time, such as:

- If many users are set up to start syncing around the same time
- When sync is pending for a significant number of interactions

For example, at a large company, an extended wait time is likely on the first sync.

Einstein Activity Capture can sync up to 50,000 interactions per user at a time. If you have more than 50,000 events to sync, an additional nonsyncing interaction is picked up for sync only when one of the 50,000 stops syncing. An interaction stops syncing if you or someone with access deletes the interaction in Salesforce or your external calendar, if the interaction has occurred and no longer meets past event sync filters, or if an interaction sync issue occurs.

Deleting a Synced Interaction

If an admin selects **Remove deleted interactions from a configuration's advanced sync settings**, when you delete a syncing interaction, it's also removed from the connected accounts. You can delete an interaction in Salesforce only if the interaction hasn't already happened.

How Interaction Attendees Sync with Einstein Activity Capture

If you sync interactions with Einstein Activity Capture, invited contacts sync as Interaction Attendee records in Salesforce.

Interaction attendee details sync when the interaction organizer is a Salesforce user who's been set up to sync interactions with Einstein Activity Capture. If the interaction attendee isn't a Salesforce user or contact, only the email ID of the attendee is synced to Salesforce.

Einstein Activity Capture syncs up to 50 attendees per interaction.

Field Mappings for Interactions Sync

When you use Einstein Activity Capture to sync interactions, fields from the connected Microsoft or Google account are mapped to fields in your Salesforce interactions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Object	Salesforce Field	Connected Account Field
Interaction	Name	Subject
	Account	No label
	Start Time	ActivityDateTime
	End Time	EndDateTime
	Interaction Type	No label
	Location	No label
	Related Record	No label
	Description	Description
Interaction Attendee	Attendee Type	No label
	Individual	No label
	User	Email ID To map the required or optional attendee to a Salesforce user or contact. If no mapping is available, only the email ID details are synced.
	Contact	
	Email ID	
	Attendee Response	Response
	Organizer	No label

Insurance for Financial Services Cloud

With the new Set Policy Types Order option on the Policy component, keep the most popular or frequently used policy types at the top of the list. And you can now change the default title of the Policy component to a custom title that best indicates the information you choose to display.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

Set Policy Type Order

You can customize the policy type display order on the Policy component. For example, you can keep the most popular or frequently used policy types at the top of the list. By default, policy types appear in alphabetical order.

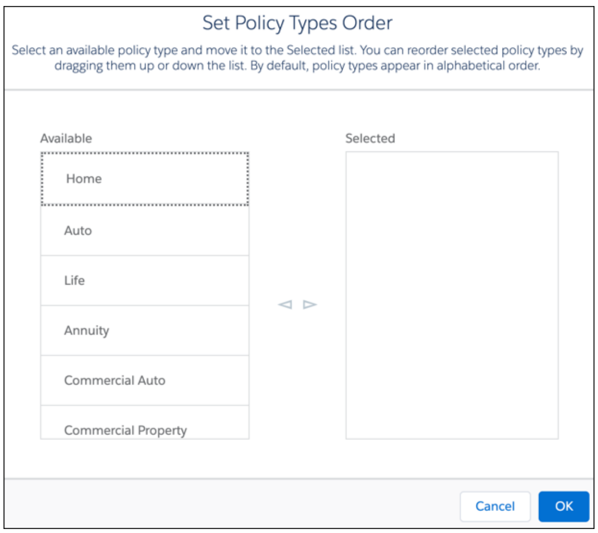
Set a Custom Title for the Policy Component

You can change the default title of the Policy component to a custom title that best indicates the information you choose to display.

Set Policy Type Order

You can customize the policy type display order on the Policy component. For example, you can keep the most popular or frequently used policy types at the top of the list. By default, policy types appear in alphabetical order.

1. On an account or household page, from Setup, select **Edit Page**.
2. Click anywhere on the Policy component to select it.
3. In the properties pane, under Set Policy Types Order, click **Select**.
4. Move policy types to the Selected list, reorder them by dragging them up or down the list, and click **OK**.



5. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

Set a Custom Title for the Policy Component

You can change the default title of the Policy component to a custom title that best indicates the information you choose to display.

1. On an account or household page, from Setup, select **Edit Page**.
2. Click anywhere on the Policy component to select it.
3. In the properties pane, in the Title field, enter a title for component.
4. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.

Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine

Switch to the enhanced Rollup-by-Lookup (RBL) framework and use the superior processing power of CRM Analytics for faster calculation of RBL rules. The RBL framework lets you convert your existing RBL rules into Data Processing Engine definitions. These high-performance definitions significantly reduce the processing time to aggregate financial information. With Data Processing Engine, you have greater flexibility when defining or modifying RBL rules. For example, you can add multiple data sources, define joins and appends, and add formulas to your rules.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

Enable the RBL Using Data Processing Engine Framework

To enable the new Rollup-by-Lookup (RBL) framework in your Salesforce org, enable the RBL Using Data Processing Engine setting. After you enable the new RBL framework, you can't create, update, or delete any RBL rules in the old framework.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

1. From Setup, in the Quick Find box, enter `Financial Services`, and then select **General Settings**.
2. Enable **RBL Using Data Processing Engine**.

   This setting prevents existing RBL rules from running in batch or asynchronous mode. But the rules continue to run in real time even after this setting is enabled.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Convert RBL Rules into Data Processing Engine Definitions

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Convert your existing RBL rules into Data Processing Engine definitions for faster calculations.

The RBL Using Data Processing Engine framework must be enabled before you can convert your RBL rules into Data Processing Engine definitions.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

1. From Setup, in the Quick Find box, enter `Financial Services`, and then select **General Settings**.
2. Review and assign permissions to work with Data Processing Engine.

   Your Salesforce org and users require permissions and access to create, activate, and run Data Processing Engine definitions. The Analytics Cloud Integration User profile requires Read access on all the objects and fields selected in the Data Source node. The writeback user specified in a Writeback Object node requires Create access on all the target objects and fields selected in the node. For more information, see Permissions to Work with Data Processing Engine.
3. Enable **Convert RBL Rules into Data Processing Engine Definitions**.

   Warning: You can convert your RBL rules only one time. After you start the process, you can't stop or undo it. Ensure that the number of active RBL rules that you're trying to convert doesn't exceed your org's limit of active Data Processing Engine definitions.

Manage Data Processing Engine Definitions

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

After the Rollup-by-Lookup (RBL) rules are converted to Data Processing Engine definitions, you can view or edit them in Data Processing Engine.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

1. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.
2. Click a definition to view or edit its details.

   You can also activate or deactivate the definition.

Run Data Processing Engine Definitions

You can run Data Processing Engine definitions in many ways. For example, you can use a flow, REST API, or Apex trigger. Use Monitor Workflow Services to track the progress and status of a definition run.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

Use an Autolaunched Flow to Run a Data Processing Engine Definition

Associate a Data Processing Engine definition with an autolaunched flow. Then run the flow manually or invoke it by Apex, processes, or REST API. You can clone and use the provided Data Processing Sample flow or create a flow according to your requirements.

Use a Schedule-Triggered Flow to Run a Data Processing Engine Definition

Associate a Data Processing Engine definition with a schedule-triggered flow. Then specify the date, time, and frequency to run the flow. You can clone and use the provided Schedulable Data Processing Sample flow or create a flow according to your requirements.

Use REST API or Apex Trigger to Run a Data Processing Engine Definitions

You can run Data Processing Engine definitions using REST API or Apex triggers.

Use an Autolaunched Flow to Run a Data Processing Engine Definition

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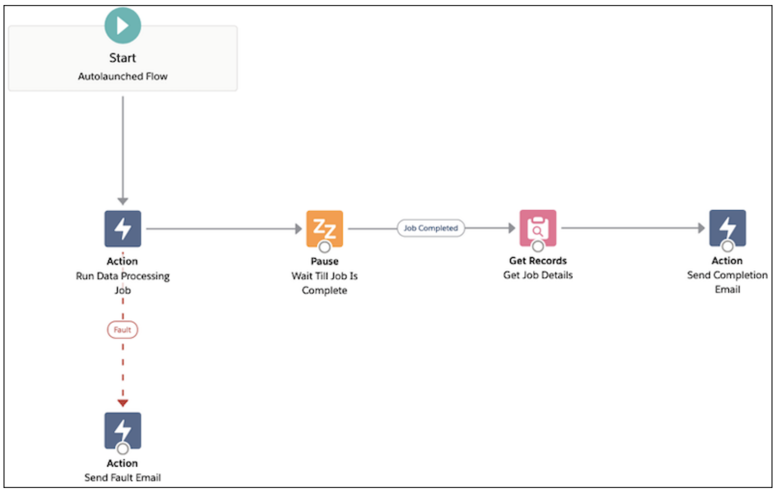
Associate a Data Processing Engine definition with an autolaunched flow. Then run the flow manually or invoke it by Apex, processes, or REST API. You can clone and use the provided Data Processing Sample flow or create a flow according to your requirements.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Open the Data Processing Sample flow.



3. Double-click the Run Data Processing Job node to open it.
4. In the Category section, select **Data Processing Engine**.
5. In the Action field, select the data processing engine definition that you want to run.
6. Enter appropriate values for the input variables.
7. Click **Done**.
8. Save your changes, and then activate the flow.
9. To run the flow, click **Run**.

   Or, you can launch the flow using an Apex trigger. Here's an example.

```
//Trigger Code
trigger InitiateCalcJob on MulesoftJob__c (after update) {
for (MulesoftJob__c job: Trigger.new) {
if(Trigger.oldMap.get(job.id).Status__c == 'In Progress' && job.Status__c == 'Completed'){
RunFlowFuture.runFlow(job.RBL_Job_Name__c);
}
}
}
// Future method code
global class RunFlowFuture {
public static Flow.Interview.Data_Processing_Flow rblFlow {get; set;}
```

```
@future
public static void runFlow(String ruleName) {
if(ruleName != null){
Map<String, Object> myMap = new Map<String, Object>();
myMap.put('v1', 'String');
rblFlow = new Flow.Interview.Data_Processing_Flow(myMap);
rblFlow.start();
}
}
}
```

Use a Schedule-Triggered Flow to Run a Data Processing Engine Definition

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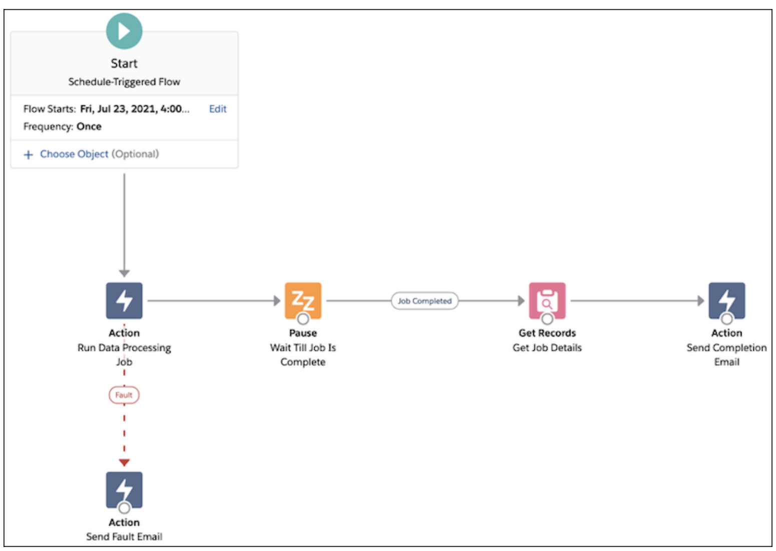
Associate a Data Processing Engine definition with a schedule-triggered flow. Then specify the date, time, and frequency to run the flow. You can clone and use the provided Schedulable Data Processing Sample flow or create a flow according to your requirements.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Open the Schedulable Data Processing Sample flow.



3. In the Start node, specify the date, time, and frequency to run the flow.
4. Double-click the Run Data Processing Job node to open it.
5. In the Category section, select **Data Processing Engine**.
6. In the Action field, select the data processing engine definition that you want to run.
7. Enter appropriate values for the input variables.
8. Click **Done**.
9. Save your changes, and then activate the flow.

   The flow runs according to the set schedule.

Use REST API or Apex Trigger to Run a Data Processing Engine Definitions

You can run Data Processing Engine definitions using REST API or Apex triggers.

Here's an example of how you can run a Data Processing Engine definition using REST API.

```
Api Type:REST
Method :POST
EndPoint :/services/data/v50.0/actions/custom/dataProcessingEngineAction/RBLForAUMHH
Url :
https://mist66.soma.salesforce.com/services/data/v50.0/actions/custom/dataProcessingEngineAction/RBLForAUMHH
Response :[
{"actionName":"RBLForAUMHH",
"errors":null,
"isSuccess":true,
"outputValues":{"batchJobId":"0mdx000000000U1AAI","accepted":true}}
]
```

Here's an example of how you can run a Data Processing Engine definition using an Apex trigger.

```
public class InvokeCalcJobViaRest {
public void invokeJob(String ruleName){
Http h = new Http();
HttpRequest req = new HttpRequest();
req.setEndpoint(URL.getSalesforceBaseUrl().toExternalForm() +
'/services/data/v50.0/actions/custom/dataProcessingEngineAction/'+ruleName);
req.setBody('{"inputs":[{}]}');
req.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
req.setHeader('Content-Type', 'application/json');
req.setMethod('POST');
HttpResponse res = h.send(req);
System.debug(res);
}
}
```

Best Practices for Faster Processing

Before you run Data Processing Engine definitions, understand the best practices.

Note: Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

- If you're using person accounts in your org, disable updates to the Primary Contact field on the Account object.
- Disable the triggers on target objects. Or, you can configure your RBL users (users who run the RBL rules) to bypass the triggers. Disabling or bypassing the triggers improves the write-back performance.
- Group your Data Processing Engine definitions based on source and write-back combinations.

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