




Financial Services Cloud Administrator Guide

Salesforce, Summer '21



Note: This release is in preview. Features described in this document don't become generally available until the latest general availability date that Salesforce announces for this release. Before then, and where features are noted as beta, pilot, or developer preview, we can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

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BUILD A LIFETIME OF TRUST BY TRANSFORMING BUSINESS AROUND YOUR CUSTOMERS

Built on the world's #1 CRM platform, Financial Services Cloud enables financial services institutions to build trust by unifying the customer experience across channels, geographies, and lines of business—both commercial and consumer. Purpose-built industry functionality and the capabilities of Sales Cloud and Service Cloud enable financial services firms to increase employee productivity, accelerate time to value, and deepen customer trust with every interaction.

We've done the hard part. Your users get the tools that let them focus on high-value customer 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. Start with a Financial Services Cloud trial org. Or 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](#).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

FINANCIAL SERVICES CLOUD OVERVIEW

Review planning considerations and data model information before you plan your Financial Services Cloud implementation.

[Considerations for Designing Your Financial Services Cloud Implementation](#)

Plan ahead to make the transition easier for your user teams, partners, and clients. To help ensure successful launch and adoption, determine how you want to support client interactions and services.

[The Salesforce Data Model for Financial Services Cloud](#)

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.

[Leverage Person Accounts in Financial Services Cloud](#)

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 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.

[Financial Services Cloud Permission Set Licenses](#)

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

[Financial Services Cloud Field Sets](#)

Here's a complete list of field sets used in Financial Services Cloud.

[Custom Settings](#)

Custom settings enable you to alter the behavior of your Financial Services Cloud installation.

Considerations for Designing Your Financial Services Cloud Implementation

Plan ahead to make the transition easier for your user teams, partners, and clients. To help ensure successful launch and adoption, determine how you want to support client interactions and services.

You can implement Financial Services Cloud in a new Salesforce org or an existing org. Work with your Salesforce team to determine the best option for your organization.

- 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.

EDITIONS

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- Determine if any limits or limitations affect your implementation.

SEE ALSO:

[Financial Services Cloud Availability and Limitations](#)

The Salesforce Data Model for Financial Services Cloud

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.

[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.

[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.

[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 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 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 Leads and Opportunities Modeled?](#)

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

[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.

EDITIONS

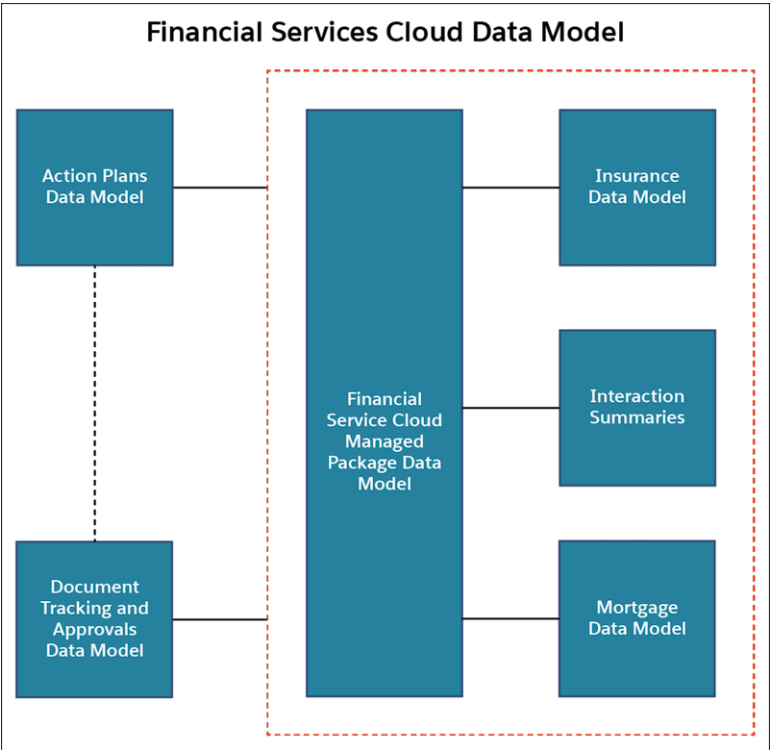
Financial Services Cloud is available in Lightning Experience.

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

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.

Financial Services Cloud Data Model Overview

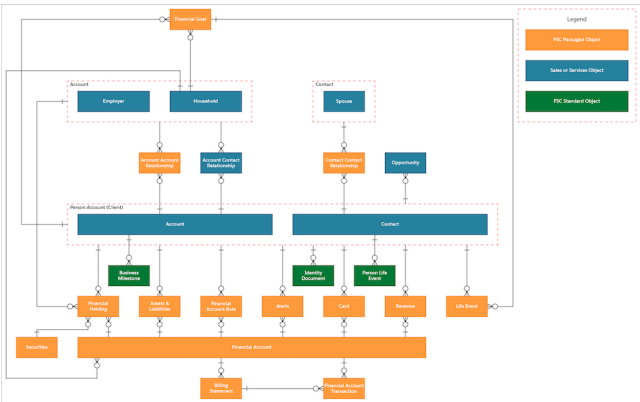


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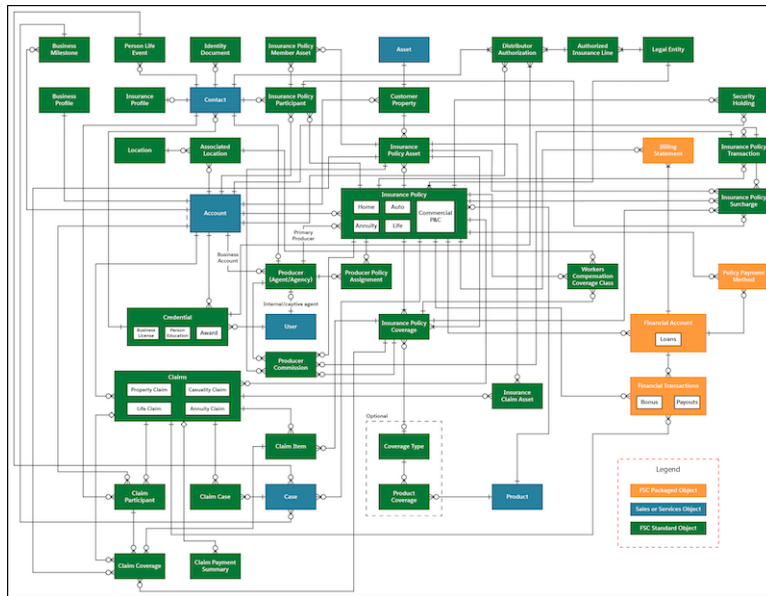
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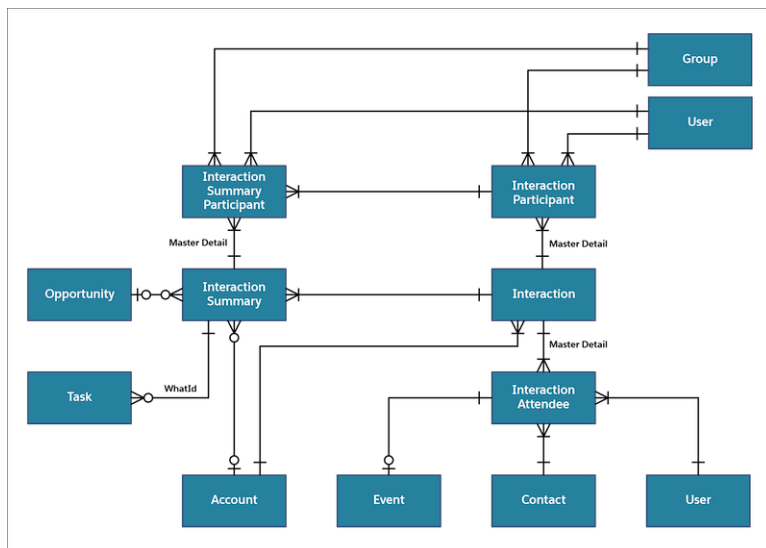
Financial Services Cloud Managed Package Data Model



Financial Services Cloud Insurance Data Model



Financial Services Cloud Interaction Summaries Data Model



The diagram illustrates the relationships between existing objects (green boxes) and new BPO objects (blue boxes). The central entity is the **Financial Deal** (blue box). It is connected to several other entities:

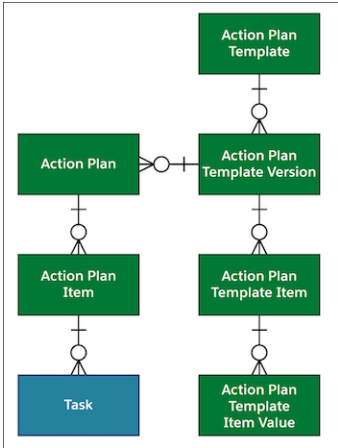
- Task** (green box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Task end and a multiplicity of 1 at the Financial Deal end.
- Account** (green box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Account end and a multiplicity of 1 at the Financial Deal end.
- Financial Deal Party** (blue box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Financial Deal Party end and a multiplicity of 1 at the Financial Deal end.
- Group** (green box): Connected to **Financial Deal Participant** (blue box) via a directed association with a multiplicity of 1 at the Group end and a multiplicity of 1 at the Financial Deal Participant end.
- Financial Deal Participant** (blue box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Financial Deal Participant end and a multiplicity of 1 at the Financial Deal end.
- Interaction Summary** (green box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Interaction Summary end and a multiplicity of 1 at the Financial Deal end.
- Interaction** (green box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Interaction end and a multiplicity of 1 at the Financial Deal end.
- Financial Deal Product** (blue box): Connected to **Financial Deal** via a directed association with a multiplicity of 1 at the Financial Deal Product end and a multiplicity of 1 at the Financial Deal end.
- User** (green box): Connected to **Financial Deal Participant** via a directed association with a multiplicity of 1 at the User end and a multiplicity of 1 at the Financial Deal Participant end.
- Product** (green box): Connected to **Financial Deal Product** via a directed association with a multiplicity of 1 at the Product end and a multiplicity of 1 at the Financial Deal Product end.

Legend:

- Existing Objects (Green box)
- New BPO (Blue box)

[illegible]

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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 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

Object	Standard or Custom	Purpose	Record Types
Account	Standard	<ul style="list-style-type: none">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 tierRelated to opportunities, cases, and other Salesforce transactions as well as	Person account

Object	Standard or Custom	Purpose	Record Types
		events, tasks, calls, and other Salesforce communications	

 **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.

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.

Object	Standard or Custom	Purpose	Record Types
Account	Standard	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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

EDITIONS


Financial Services Cloud is available in Lightning Experience.

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 **Note:** Use the Individual record type when a client is a person. Use the Business 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.

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.

Membership Type	Object	Standard or Custom	Represents	Record Types
Direct (individual member)	Account Contact Relationship	Standard	The membership of a person in a group (for example, a household).	
Indirect (business member)	Account Contact Relationship	Standard	<p>The membership of a business in a group, which occurs only when both these conditions are met:</p> <ul style="list-style-type: none"> • The business is related to a person in the group • The business's Add to Group flag is set 	



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.

Object	Standard or Custom	Represents	Record Types
Account-Account Relationship	Custom	The relationship between businesses, institutions, and groups.	
Account Contact Relationship	Standard	The relationship between a person and a business or other account.	
Contact-Contact Relationship	Custom	The relationship between two people.	

Object	Standard or Custom	Represents	Record Types
Reciprocal Role	Custom	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.	

 **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](#)

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.

Object	Standard or Custom	Represents	Record Types
Education	Custom	Details of educational achievements.	
Employment	Custom	Details of employment history.	

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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.

Object	Standard or Custom	Represents	Record Types
Assets and Liabilities	Custom	Assets, such as real estate or collectibles, and liabilities, such as a mortgage, that are not otherwise	<ul style="list-style-type: none"> • Asset • Liability

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Object	Standard or Custom	Represents	Record Types
		represented in the financial account.	
Financial Goal	Custom	A person's financial goal, such as retirement or home purchase.	
Identification Document	Custom	Details of documents used to verify the identity of a person.	
Revenue	Custom	Revenue generated from operating a person's financial account or by offering advisory services.	

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.

Object	Standard or Custom	Represents	Record Types
Financial Account	Custom	A financial account, such as a brokerage account or bank account.	<ul style="list-style-type: none"> • Auto Loan • Bank Account • Checking Account • Credit Card • General Account • HELOC • Investment Account • Loan Account • Mortgage • Savings Account
Charges and Fees	Custom	The charges and fees taken for servicing a Financial Account. Record types differentiate between "line of credit" (Credit) and "deposit" (Debit) accounts.	<ul style="list-style-type: none"> • Credit • Debit
Financial Account Role	Custom	The role occupied by a person or organizational entity	<ul style="list-style-type: none"> • Account Role • Contact Role

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Object	Standard or Custom	Represents	Record Types
		that is involved with a financial account, such as a beneficiary or trustee.	
Financial Account Transaction	Custom	The transactions that have taken place on a Financial Account.	
Billing Statement	Custom	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.	<ul style="list-style-type: none"> • Credit • Debit
Card	Custom	The cards to access funds in a Financial Account.	
Financial Holding	Custom	A holding in an investment account, such as 10,000 shares of Salesforce (CRM).	
Securities	Custom	An asset that is part of a financial holding, such as a stock.	

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](#).

Object	Standard or Custom	Represents	Record Types
Lead	Standard	Details of leads provided by customers, employees, and associates.	<ul style="list-style-type: none"> • General • Referral • Retirement Planning
Opportunity	Standard	Details of the opportunities to sell	<ul style="list-style-type: none"> • General • Opportunity (Wallet Share)

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

Object	Standard or Custom	Represents	Record Types
		customers new products or services.	<ul style="list-style-type: none"> Retirement Planning

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.

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

Leverage Person Accounts in Financial Services Cloud

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 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.

Financial Services Cloud enables person accounts in trial orgs and new installations.

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.

EDITIONS

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

[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.

[Configure 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.

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 1: Person Account versus Individual Models for Financial Services Cloud Features

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Feature	Person Accounts	Individual Object Model
ISV packages built on the Financial Services Cloud ecosystem	Partial Not all packages are built to support person accounts.	Partial Not all packages are built to support the individual object model.
Packaged page layouts and record types	Partial New trial orgs created after the Spring '18 release only.	Yes
Available in Advisor Partner and Customer portals	Yes	Yes
Optimized for the Salesforce mobile app	Yes	Partial The individual object model is displayed as distinct Account and Contact records.
Lightning App Builder component for displaying activities timeline for an account	Activities	Client Activities
Salesforce Flow for Financial Services Cloud	Yes	No

Configure 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- i. Save your changes.
- j. Repeat for all profiles in use.

 **Note:** Don't deactivate the Individual record type for Account or Contact.


SEE ALSO:

[Assign Record Types to Profiles in the Original Profile User Interface](#)


[Enable Person Accounts](#)

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.

 **Note:** The first label you enter must be *Person Account*. You can choose the names for all subsequent record types.

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. (Optional) If you are using a Developer Edition org, enter the org namespace for your org (not the package namespace) in the **Record Type Namespace (Account)** field.

 **Note:** If you are not using a Developer Edition org, ensure that the **Record Type Namespace (Account)** field is blank.

9. Leave the **Contact Record Type** field blank. 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.

 **Note:** Remove the Company field from your Lead and Referral page layouts to support conversion to person accounts.

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.

- 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.

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

- 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.

- 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.

- 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 PersonRecordTypeId to RecordTypeId.

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.

- Export all records to ensure that they have successfully converted to person accounts.
- Open a converted record, and view all tabs (such as Relationships) to confirm that your data and relationships are unchanged.

Financial Services Cloud Permission Set Licenses

Permission set licenses incrementally entitle users to access features that are not included in their user licenses. Users can be assigned any number of permission set licenses. Financial Services Cloud makes a number of permission set 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 Service 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Permission Set License	Description
Financial Service 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.
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.
Document Checklist	Enables user access to the Document Checklist feature in Financial Services Cloud.
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.
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.

SEE ALSO:

[Tip Sheet: Manage Bulk Permission Set License \(PSL\) Assignments for Financial Services Cloud](#)

[Salesforce Help: Permission Set Licenses](#)

Financial Services Cloud Field Sets

Here's a complete list of field sets used in Financial Services Cloud.

Referrals and Scoring

Field Set	API Name	Object	Where is it used?
LBLLabel_Field_Set_Referrals_Expressed_Interest	FSC_Referrals_Expressed_Interest	Lead and Referral	Client profile's Referrals tab

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Relationship Groups

Field Set	API Name	Object	Where is it used?
Group Member Details	WM_Client_Groups_Member_Details	Account	Client profile's Relationships tab
LBLLabel_Field_Set_Relationship_Groups	WM_Client_Relationship_Groups	Account	Client profile's Relationships tab
LBLLabel_Field_Set_Relationship_Group_Members	WM_Client_Relationship_Group_Members	Account	Client profile's Relationship Groups table

Retail Banking

Field Set	API Name	Object	Where is it used?
Financial Accounts Summary	FSC_Banker_Profile_Fin_Acct_Summary	Account	Personal Banker profile's Financials tab
Auto Loan Account	FSC_Client_AutoLoan	Financial Account	Client profile's Financials tab
Checking Account	FSC_Client_CheckingAccount	Financial Account	Client profile's Financials tab
Credit Card Account	FSC_Client_CreditCard	Financial Account	Client profile's Financials tab
Savings Account	FSC_Client_SavingsAccount	Financial Account	Client profile's Financials tab
Loan Account	FSC_Client_LoanAccount	Financial Account	Client profile's Financials tab
Mortgage Account	FSC_Client_MortgageAccount	Financial Account	Personal Banker profile's Financials tab
HELOC Account	FSC_Client_HELOC	Financial Account	Client profile's Financials tab
Auto Loan Account	FSC_Group_AutoLoan	Financial Account	Household profile's Financials tab
Checking Account	FSC_Group_CheckingAccount	Financial Account	Household profile's Financials tab
Credit Card Account	FSC_Group_CreditCard	Financial Account	Household profile's Financials tab
Savings Account	FSC_Group_SavingsAccount	Financial Account	Household profile's Financials tab
Loan Account	FSC_Group_LoanAccount	Financial Account	Household profile's Financials tab
Mortgage Account	FSC_Group_MortgageAccount	Financial Account	Household profile's Financials tab
HELOC Account	FSC_Group_HELOC	Financial Account	Household profile's Financials tab
LBLLabel_Field_Set_Referrals_Made (Communities)	FSC_Referrals_Made_Community	Lead and Referral	Client profile's Referrals tab
LBLLabel_Field_Set_Referrals_Made	FSC_Referrals_Made_Community	Lead and Referral	Client profile's Referrals tab
LBLLabel_Field_Set_Referral_Form	FSC_Referral_Form	Lead and Referral	Global referral form

Wealth Management

Field Set	API Name	Object	Where is it used?
LBLLabel_Field_Set_Addresses	WM_Client_Profile_Details_Section_3	Account	Client profile's Details tab

Field Set	API Name	Object	Where is it used?
LBLLabel_Field_Set_Addresses	WM_HH_Profile_Details_Section_2	Account	Household profile's Details tab
LBLLabel_Field_Set_Client_Header	WM_Client_Profile_Header	Account	Client profile's page header
LBLLabel_Field_Set_Client_Info	WM_Client_Edit_Section_1	Account	Edit client dialog box
LBLLabel_Field_Set_Client_Info	WM_Client_New_Section_1	Account	New client dialog box
LBLLabel_Field_Set_Client_Info	WM_Client_Profile_Details_Section_1	Account	Client profile's Details tab
LBLLabel_Field_Set_Client_Services	WM_Client_Edit_Section_4	Account	Edit client dialog box
LBLLabel_Field_Set_Client_Services	WM_Client_New_Section_3	Account	New client dialog box
LBLLabel_Field_Set_Client_Services	WM_Client_Profile_Details_Section_4	Account	Client profile's Details tab
LBLLabel_Field_Set_Employment_Info	WM_Client_Edit_Section_6	Account	Edit client dialog box
LBLLabel_Field_Set_Employment_Info	WM_Client_New_Section_5	Account	New client dialog box
LBLLabel_Field_Set_Employment_Info	WM_Client_Profile_Details_Section_6	Account	Client profile's Details tab
LBLLabel_Field_Set_Financial_Accounts_Summary	WM_Client_Profile_Fin_Acct_Summary	Account	Client profile's Financials tab
LBLLabel_Field_Set_Financial_Accounts_Summary	WM_HH_Profile_Fin_Acct_Summary	Account	Household profile's Financials tab
LBLLabel_Field_Set_Financial_Summary	WM_Client_Profile_Details_Section_7	Account	Client profile's Details tab
LBLLabel_Field_Set_Household_Header	WM_HH_Profile_Header	Account	Household profile's page header
LBLLabel_Field_Set_Household_Info	WM_HH_Profile_Details_Section_1	Account	Household profile's Details tab
LBLLabel_Field_Set_Household_Summary	WM_Client_Profile_Relations_HH_Summary	Account	Client and household profiles' Relationships tabs
LBLLabel_Field_Set_Know_Your_Client	WM_Client_Edit_Section_5	Account	Edit client dialog box
LBLLabel_Field_Set_Know_Your_Client	WM_Client_New_Section_4	Account	New client dialog box
LBLLabel_Field_Set_Know_Your_Client	WM_Client_Profile_Details_Section_5	Account	Client profile's Details tab
LBLLabel_Field_Set_Mailing_Address	WM_Client_Edit_Section_3	Account	Edit client dialog box
LBLLabel_Field_Set_Mailing_Address	WM_Client_New_Section_7	Account	New client dialog box
LBLLabel_Field_Set_Other_Address	WM_Client_Edit_Section_33	Account	Edit client dialog box
LBLLabel_Field_Set_Other_Address	WM_Client_New_Section_73	Account	New client dialog box
LBLLabel_Field_Set_Permanent_Address	WM_Client_Edit_Section_31	Account	Edit client dialog box
LBLLabel_Field_Set_Permanent_Address	WM_Client_New_Section_71	Account	New client dialog box
LBLLabel_Field_Set_Phone_and_Email	WM_Client_Edit_Section_2	Account	Edit client dialog box
LBLLabel_Field_Set_Phone_and_Email	WM_Client_New_Section_6	Account	New client dialog box
LBLLabel_Field_Set_Phone_and_Email	WM_Client_Profile_Details_Section_2	Account	Client profile's Details tab

Field Set	API Name	Object	Where is it used?
LBLLabel_Field_Set_Seasonal_Address	WM_Client_Edit_Section_32	Account	Edit client dialog box
LBLLabel_Field_Set_Seasonal_Address	WM_Client_New_Section_72	Account	New client dialog box
LBLLabel_Field_Set_System_Info	WM_Client_Profile_Details_Section_8	Account	Client profile's Details tab

Custom Settings

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 5: Financial Services Cloud Custom Settings

Settings group	Setting	Effect	Hierarchical
B2C Lead Company Name Config	Override Company Name	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	Yes
Individual Excluded Fields	Excluded Fields	List of fields that are not returned for an Individual.	No
Industries Application Config	Account Name format	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	Yes
Industries Application Config	Application Name	For internal use only.	Yes
Industries Application Config	Create Inverse	Indicates whether reciprocal AAR record is created.	Yes
Industries Application Config	Default Individual Type	Indicates the default record type for	Yes

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Settings group	Setting	Effect	Hierarchical
		individuals. Defaults to Individual .	
Industries Application Config	Dependent Packages	Comma-separated list of dependent packages whose fields will be auto resolved. For example, by including FSC in this list, when Amount__c is entered in query builder its namespace is automatically added so the query builder uses <namespace>__Amount__c.	Yes
Industries Application Config	Individual Account Creation from Contact	Indicates whether the account part of the Individual is created when creating a contact	Yes
Industries Application Config	Lead Conversion Batch Size	Defines the batch size for processing lead conversions when converting multiple Individual leads.	Yes
Industries Application Config	Multiple Relationship Groups	Enables a contact to be a member or related member of multiple relationship groups. See Enable Multiple Relationship Groups	Yes
Industries Application Config	Page Layout Api Version	Specifies the REST API version used when retrieving page layout information.	Yes
Industries Application Config	Restrict ACR Record Visibility	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.	Yes
Industries Application Config	Show Detailed Error Messages	Indicates whether a detailed error message is shown when someone performs an action without having permission. See Show Detailed Error Messages	Yes
Industries Application Config	Sync Individual System Fields	Indicates whether Account and Contact system fields are kept in sync when an insert is performed on either entity.	Yes

Settings group	Setting	Effect	Hierarchical
Manage Client Interaction Dates	Enable	Updates and shows Next and Last Interaction dates for an account. Enables task and event triggers that keep interaction dates in sync.	No
Record Rollup Configuration	-	Configure record rollups for objects in Financial Services Cloud.	
Use Person Account	Enable	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 Disable Person Accounts in Financial Services Cloud	No
Wealth Application Config	Enable Business Referrals Made	Indicates whether the Business Referrals made list and referrals made summary components are enabled.	Yes
Wealth Application Config	Enable Group Record Rollups	Indicates whether rolling of household__c field to records is performed. See Temporarily Disable Rollups to Accelerate Data Loads	Yes
Wealth Application Config	Enable Referrer Score	Indicates whether referrer score calculations are performed. See Enable the Referrer Score	Yes
Wealth Application Config	Enable Rollup Summary	Indicates whether rollup summary calculations are performed. See Temporarily Disable Rollups to Accelerate Data Loads	Yes
Wealth Application Config	Group Record Rollup Timestamp	For internal use only.	Yes
Wealth Application Config	Interaction Update Frequency	Specifies the frequency (in minutes) with which the Last Interaction and Next Interaction dates are updated.	Yes
Wealth Application Config	Rejected Referral Status	Indicates whether the Lead Status is used to identify rejected referrals.	Yes

Settings group	Setting	Effect	Hierarchical
Wealth Application Config	Rollup Summary Timestamp	For internal use only.	Yes

WHAT'S NEW IN SPRING '21

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

Capture and Share Interaction Summaries on page 143

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.

Branch Management on page 135

Track branch performance and productivity with Branch Management. The Branch Management data model, console app, and branch association engine (beta) let branch managers and administrators track the work output of branches, employees, and customer segments in Financial Services Cloud. Branch Management works seamlessly with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

- **Configure Branch Management on page 137** Configure your org to get the most from Branch Management features.
- **Work with Branch Management on page 140** The Branch Console app gives users quick access to branch management features in one place. Branch managers or admin users define branch units and hierarchies, and enable bankers and other business members for assignment to specific branches. Bankers and other user users or contacts select the branch they are currently assigned to, so that the work they do with leads and accounts gets automatically attributed to the correct branch.

Insurance for Financial Services Cloud

New options on the Policy component give you greater control over the information that you want to appear on the component. With the Life Events or Business Milestones component now supported on mobile devices, agents can capture life events or business milestones on the go.

- **Capture Life Events and Business Milestones on the Go**

The Life Events or Business Milestones component is now supported on mobile devices. No matter where you are, you can capture events or milestones with just a few taps on your mobile device. To view the details about an event or milestone, tap on that event or milestone.

- **PK Chunking Support Added for Key Claim and Policy Objects**

We added Primary Key (PK) chunking support for Claim, ClaimParticipant, CustomerProperty, InsurancePolicy, InsurancePolicyAsset, and InsurancePolicyParticipant objects. With PK chunking, you get better performance and reliability when performing bulk queries on these objects.

- **Set Policy Type Order on page 60**

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 on page 55**

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

- **Analytics for Insurance**

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Use the new Analytics for Insurance dashboards to analyze your households and uncover cross-sell opportunities. The improved configuration wizard makes it easier to customize your Analytics for Insurance app data. Get predictive insights even faster with the Einstein Discovery for Insurance Analytics template.

Rollups for Financial Services Cloud

Use optimized code for record rollups and record rollup triggers. Perform rollup-by-lookup (RBL) calculations faster with the new, high-performance RBL framework.

- [Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine on page 210](#)

Switch to the enhanced Rollup-by-Lookup (RBL) framework and use the superior processing power of Tableau CRM 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.

- [Optimize Record Rollup Performance on page 193](#)

Use the Record Rollup Optimization org preference to improve record rollup performance.

- [Optimize Record Rollup Triggers in Financial Services Cloud on page 194](#)

Use optimized code to improve Before Insert and Before Update record rollup trigger performance for more objects.

Manage Participant Groups in Compliant Data Sharing

Compliant Data Sharing uses participant groups to define groups of users who play the same role in their record interactions.

- [Add Participant Groups for Compliant Data Sharing on page 164](#)

Create participant groups to share a record with a group of users without having to create individual participant records for each team member.

- [Add Members to Participant Groups in Compliant Data Sharing on page 165](#)

Add users or participant groups to a participant group when they play the same role in record interactions.

- [Review and Edit Participant Groups in Compliant Data Sharing on page 165](#)

View, change, and delete participant groups from the Participant Groups page in Setup.

View Record Participants in Actionable Relationship Center

ARC's detail panel shows a list of participants and participant groups with access to the selected record through Compliant Data Sharing. Enable the **Show participants** property in step 4 of [Add Actionable Relationship Center to Page Layouts](#) on page 126

More Mobile-Enabled Financial Services Cloud Components

Six more Financial Services Cloud components have been enabled to work in the Salesforce Mobile app.

- [Mobile-Enabled Financial Services Cloud Components on page 316](#) Give Salesforce Mobile users access to the Financial Services Cloud components that they need to stay productive away from their desks.
- [Add Financial Services Cloud Components to Salesforce Mobile on page 317](#)

Follow these steps to add mobile-enabled Financial Services Cloud components to your Salesforce Mobile app.

SEE ALSO:

[Salesforce Spring '21 Release Notes: Financial Services Cloud](#)

SUBVERTICALS IN FINANCIAL SERVICES CLOUD

Set up and manage Financial Services Cloud subverticals like Commercial Banking, Insurance, Mortgage, Retail Banking, and Wealth Management.

Financial Services Cloud includes multiple subverticals. Set up one or more for your org.

[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.

[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. With the new distributor performance dashboard, reports, and performance metrics, sales managers can view a consolidated performance summary for all their distributors or monitor their individual performances. 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 Mortgage for Financial Services Cloud](#)

Mortgage for Financial Services Cloud includes a new data model for mortgage applications, new standard flow templates, and new flow screen components.

[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 Wealth Management Features](#)

Give your financial advisors a holistic view of customers with Wealth Management, a Financial Services Cloud Lightning app. Empower your advisors 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[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 assistant 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.

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](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.
5. In Page Layout To Use, select **Financial Account (Treasury Service) Layout**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 Experience Cloud Users](#)

Provide Experience Cloud users with the permissions they needed for the Referrer Score field to display in the Referrals Made Summary.

EDITIONS

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 Experience Cloud Users

Provide Experience Cloud users with the permissions they needed for the Referrer Score field to display in the Referrals Made Summary.

Profiles that provide Experience Cloud 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**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

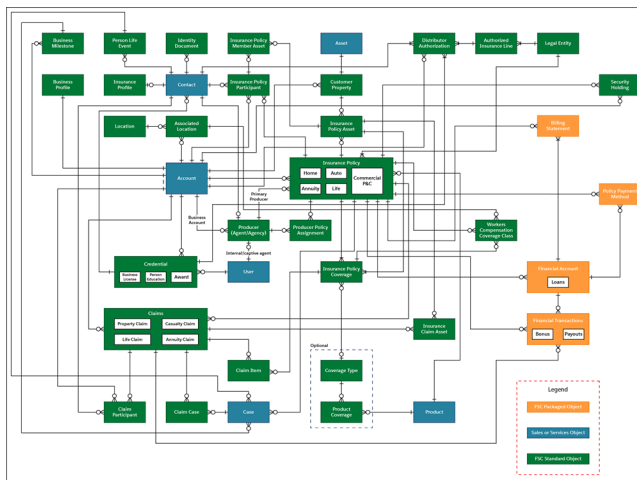
5. Select Read Access for the Referrer Score field.
6. Save your changes and return to the profile.
7. In Field-Level Security, click **View** next to Contact.
8. Click **Edit**.
9. Select Read Access for the Referrer Score field.
10. Save your changes.

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. With the new distributor performance dashboard, reports, and performance metrics, sales managers can view a consolidated performance summary for all their distributors or monitor their individual performances. 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.

EDITIONS

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



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. The Policy component on the household page gives agents a consolidated view of household policies and claims. The Life Events or Business Milestones component on the contact record page gives sales managers an at-a-glance view of producers' life events. Producer relationship cards give sales managers easy access to key information about their producers.

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.

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.

EDITIONS

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

[Assign the FSC Insurance Permission Set License to Users](#)

To access insurance 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.

[Give Agents a Consolidated View of Household Policies and Claims](#)

Configure related lists for the household page layout. Then add the Policy component to the household page to let your agents view all household policies and claims in one place.

[Enable Policy and Claim Record Rollups at Household Level](#)

To show insurance policies, claims, insurance policy participants, and claim participants as related lists at the household level, add Insurance Policies, Claims, Insurance Policy Participants, and Claim Participants as picklist values to the Rollup__c field on the Account Contact Relationship object. The Insurance Policies related list shows the policies where household members are primary insured (NamedInsuredId). The Claims related list shows the claims related to household members' accounts.

Enable Policy and Claim Rollup-By-Lookup Summaries at Household Level

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.

Enable Distributor Performance Management

Help sales managers monitor individual distributor and producer performance with distributor performance metrics and reports. You can create a home page with the distributor performance dashboard and performance metrics to give sales managers consolidated performance summaries for their distributors.

Manage Producers' Life Events

Your sales managers can now see producers' life events at a glance when you add the Life Events or Business Milestones component to the contact record page.

Provide Easy Access to Producer Information

Your sales managers can easily view key information about their producers from multiple objects, without going through multiple related lists.

Include Multi-Producer Policies in Metrics and Charts

Include policies with multiple producers in your calculations to ensure that metrics and charts show accurate policy and premium figures. By default, the policy-related metrics and charts include only the policies that are assigned to single producers.

Choose an Option for Metrics Calculations for Multiline Policies

Include only parent policies or both parent and child policies in metrics calculations, depending on how premiums are populated for multiline policies. For example, if premiums are populated for child policies and also aggregated at the parent level, then include only parent policies in calculations. By default, metrics count policies and premiums at both parent and child levels.

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 Experience 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 objects and features, users need the FSC Insurance permission set license.

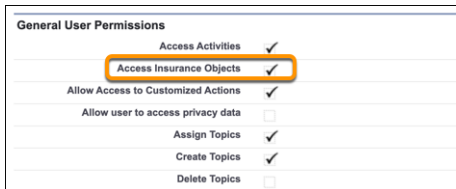
1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Click the user that you want to give permissions to.
3. Under Permission Set Assignments, click **Edit Assignments**.
4. Under Available Permission Sets, select **FSC Insurance**, and then click **Add**.
5. Save your changes.

EDITIONS

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

 **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 objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

 **Tip:** Your portal users can access insurance objects without requiring any additional permission set license. In your user profile, under General User Permissions, select **Access Insurance Objects**.



However, to access insurance features, the portal users need the Financial Services Community 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.

EDITIONS

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

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**.
Once this option is enabled, you can see these additional objects: Product Coverage and Coverage Type. And you can see the Coverage Type field (a lookup to the Coverage Type object) on the Insurance Policy Coverage object.
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.

EDITIONS

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

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 6: Insurance Fields to Encrypt

Object	Fields You can Encrypt
BusinessMilestone	MilestoneName
Claim	<ul style="list-style-type: none"> • ClaimNumber • IncidentSite • ReportNumber
CustomerProperty	<ul style="list-style-type: none"> • Address • LienHolderName

EDITIONS

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

Object	Fields You can Encrypt
IdentityDocument	<ul style="list-style-type: none"> Name ExpirationDate IssueDate
InsurancePolicy	<ul style="list-style-type: none"> PolicyNumber ServicingOffice UniversalPolicyNumber
PersonLifeEvent	EventName
SecuritiesHolding	Name

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.

EDITIONS

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

[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.

EDITIONS


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

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.

Object	Related Lists
Account	Business Milestones
Person Account	Claims, Insurance Policies, Insurance Policy Participants, Person Life Events
Contact	Person Life Events

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

EDITIONS

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

SEE ALSO:

[Work with Life Events and Business Milestones](#)

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.

EDITIONS

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

SEE ALSO:

[Work with Life Events and Business Milestones](#)

[Show All Policies or Only Owned Policies](#)

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**.

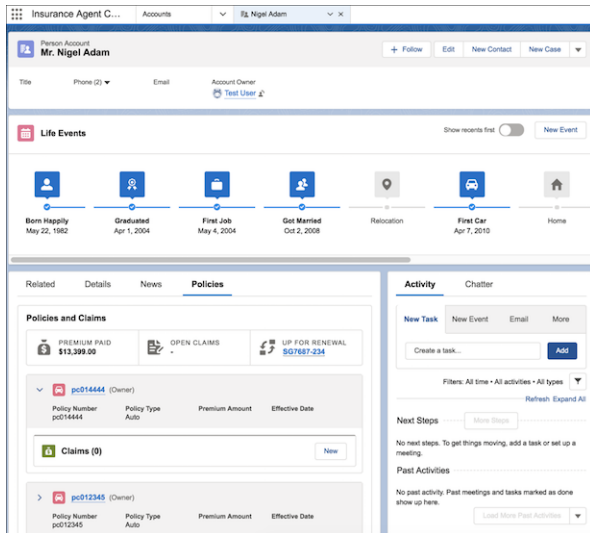
2. Choose how you want to activate the page.

- 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.

EDITIONS

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

Here's what your custom Account record page, PolicyHolder 360, looks like when an insurance agent views a client's record.



Give Agents a Consolidated View of Household Policies and Claims

Configure related lists for the household page layout. Then add the Policy component to the household page to let your agents view all household policies and claims in one place.

- Ensure that you have created and configured custom record types for individuals and groups.
 - Ensure that group record rollups are enabled and configured for optimal performance.
1. Give your users access to the Household field on the Claim, Insurance Policy, and Insurance Policy Participant objects.
 - a. From Setup, open **Object Manager**.
 - b. In the Quick Find box, enter *Claim*, then select **Claim**.
 - c. Click **Fields & Relationships**, and select **Household**.
 - d. Click **Set Field-Level Security**.
 - e. Select **Visible** for all applicable user profiles.
 - f. Save your changes.
 - g. Repeat these steps for the Insurance Policy and Insurance Policy Participant objects.
 2. Add the Household Insurance Policies, Household Insurance Policy Participants, and Household Claims related lists to the household page layout.
 - a. From Setup, open **Object Manager**.
 - b. Click **Account**, and select **Page Layouts**.
 - c. Click **Account (Household) Layout**.
 - d. On the palette, select **Related Lists**.
 - e. Drag **Household Insurance Policies**, **Household Insurance Policy Participants**, and **Household Claims** to the Related Lists section on the page.
 - f. Save your changes.
 3. Add the Policy component to the household record page.

EDITIONS

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

- a. On a household record page, from Setup, select **Edit Page**.
- b. Drag the Policy component to the main region on the page. Or, add a custom tab and drag the Policy component to the new tab.
- c. Click anywhere on the Policy component to select it.
- d. In the Properties pane, review the preselected policy KPIs, and change them according to your needs.
- e. 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 household record, the **Policies** component shows only those policies that the household members own. Selecting participant roles includes even those policies in which the household members are participants but don't own. For example, if you select the **Beneficiary** participant role, the list shows the policies that members own and the policies in which members are beneficiaries.
- f. Save your changes.

SEE ALSO:

[Create and Configure Custom Record Types for Individuals and Groups](#)
[Enable and Configure Group Record Rollups](#)

Enable Policy and Claim Record Rollups at Household Level

To show insurance policies, claims, insurance policy participants, and claim participants as related lists at the household level, add Insurance Policies, Claims, Insurance Policy Participants, and Claim Participants as picklist values to the Rollup__c field on the Account Contact Relationship object. The Insurance Policies related list shows the policies where household members are primary insured (NamedInsuredId). The Claims related list shows the claims related to household members' accounts.

In a new org with Insurance for Financial Services Cloud, the Rollup__c field on the Account Contact Relationship object includes the Insurance Policies, Claims, Insurance Policy Participants, and Claim Participants picklist values. However, if you're configuring Insurance for Financial Services Cloud in an existing org, perform these steps to add the picklist values.

1. From Setup, open **Object Manager**, and click **Account Contact Relationship**.
2. Click **Fields & Relationships**, and then select **Roll-Ups**.
3. Under Values, click **New**.
4. In the Roll-Ups field, enter these picklist values. Enter each value on its own line.
 - *Insurance Policies*
 - *Insurance Policy Participants*
 - *Claims*
 - *Claim Participants*
5. Click **Save**.

EDITIONS

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

Enable Policy and Claim Rollup-By-Lookup Summaries at Household Level

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, find and open **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
 - RBLForGWPHH
 - RBLForTotalNumberClaimHH
 - RBLForClaimPaidHH

EDITIONS

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

SEE ALSO:

[Rollups in Financial Services Cloud](#)

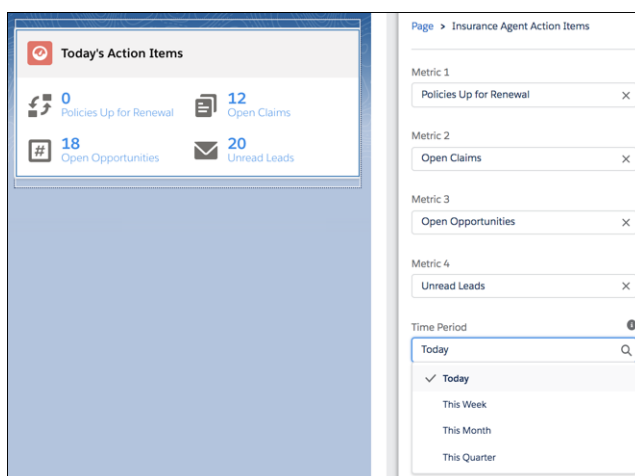
Add the Insurance Agent Action Items Component to the Console Home Page

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.

EDITIONS

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




 **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.

6. Save your changes.

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 , and then select **Edit**.
3. Under App Settings, click **User Profiles**.
4. Under Available Profiles, select a profile, and then click **Add**.
5. Save your changes.

EDITIONS

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

Enable Distributor Performance Management

Help sales managers monitor individual distributor and producer performance with distributor performance metrics and reports. You can create a home page with the distributor performance dashboard and performance metrics to give sales managers consolidated performance summaries for their distributors.

[Deploy Distributor Performance Reports and Dashboard](#)

Deploy the provided reports and dashboard before you can add them to a home page or record page.

[Add Distributor Performance Dashboard and Metrics to a Home Page](#)

Create a custom home page for your sales managers. Then add the distributor performance dashboard and distributor performance metrics to the page.

[Add Performance Metrics and Reports to Account and Contact Record Pages](#)

Your sales managers can now view individual distributor and producer performance when you add performance reports to the account and contact record pages. You can add performance metrics only to the account record page.

EDITIONS

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

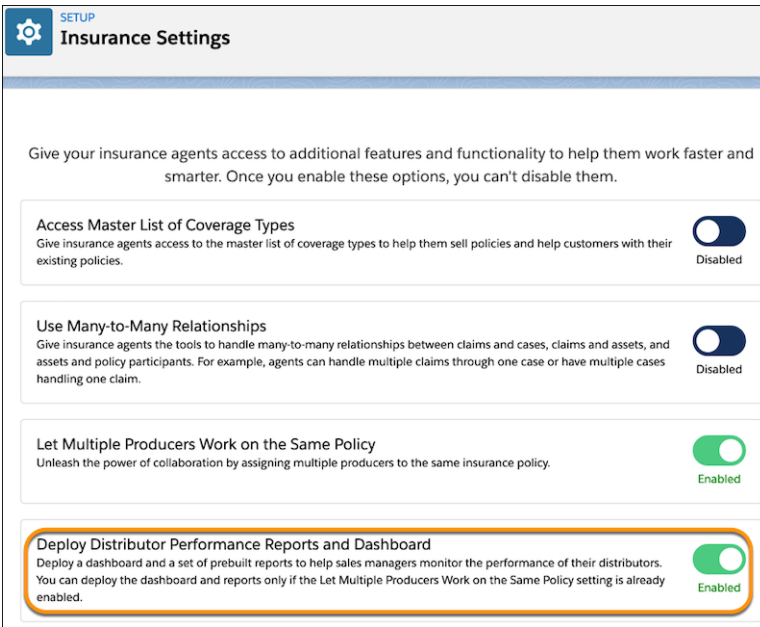
Deploy Distributor Performance Reports and Dashboard

Deploy the provided reports and dashboard before you can add them to a home page or record page.

1. From Setup, in the Quick Find box, enter *Insurance Settings*, and then select **Insurance Settings**.
2. Enable **Deploy Distributor Performance Reports and Dashboard**.

EDITIONS

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



Important: This option is available only if API access is enabled in your org.

Note: You can enable this option only if the Let Multiple Producers Work on the Same Policy option is already enabled. You can monitor the deployment progress on the Deployment Status page in Setup. You are also notified about the status via email. If the deployment fails, you can resolve the errors, and then try redeploying. After a successful deployment, you can't disable this option.

After a successful deployment, the reports are available in the Insurance Distributor Reports folder on the Reports tab in your org. The dashboard is available in the Insurance Distributor Dashboards folder on the Dashboards tab.

Before you add the dashboard or reports to a home page or record page, use enhanced folder sharing to share your dashboard and report folders.

SEE ALSO:

[Share a Report or Dashboard Folder in Lightning Experience](#)

Add Distributor Performance Dashboard and Metrics to a Home Page

Create a custom home page for your sales managers. Then add the distributor performance dashboard and distributor performance metrics to the page.

1. Add the Distributor Performance Dashboard to the page.
 - a. On the home page, from Setup, select **Edit Page**.
 - b. Drag the Dashboard component to the page.
 - c. Click anywhere on the component to select it.
 - d. In the Properties pane, from the Dashboard list, select **Distributor Performance Dashboard**.

EDITIONS

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



Note: By default, your users view the dashboard as you. That is, they see data in the dashboard according to your access to data. You can change who your users view the dashboard as. For more information, see [Dynamic Dashboards: Choose Who People View a Dashboard as in Lightning Experience](#).

2. Add the Insurance Distributor Performance Metrics component to the page.
 - a. Drag the Insurance Distributor Performance Metrics component to the page.
 - b. Click anywhere on the component to select it.
 - c. In the Properties pane, under Metrics, click **Select**.
 - d. Select the metrics that you want to add to the component, and click **OK**.
 - e. If you use the Producer Policy Assignment object to map both a single producer to a policy and multiple producers to a policy, select **Include policies with multiple producers**.
3. Save your changes.

SEE ALSO:

[Include Multi-Producer Policies in Metrics and Charts](#)

Add Performance Metrics and Reports to Account and Contact Record Pages

Your sales managers can now view individual distributor and producer performance when you add performance reports to the account and contact record pages. You can add performance metrics only to the account record page.

EDITIONS

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

1. Add performance reports to an account or contact record page.
 - a. On the record page, from Setup, select **Edit Page**.
 - b. Drag the Report Chart component to the page.
 - c. Click anywhere on the component to select it.
 - d. In the Properties pane, from the Report list, select the report that you want to add to the component.



Important: The Report list includes reports for both the account and contact record pages. Select an appropriate report, depending on the record page you are on. For example, on the account record page, select Renewals by Policy Type (Account). On the contact record page, select Renewals by Policy Type (Contact).


- e. From the Filter By list, select **Account ID** or **Contact ID**, depending on the record page you are on.
- f. Repeat steps 1.b through 1.e to add more reports to the page.



Tip: The performance reports are based on these provided custom report types.

- Accounts with Contacts and Business Licenses
- Accounts with Contacts and Distributor Auth.
- Accounts with Multiproducer Policies
- Accounts with Multiproducer Policies and Claims
- Contacts with Multiproducer Policies
- Contacts with Multiproducer Policies and Claims

2. Add performance metrics to the account record page.
 - a. Drag the Insurance Distributor Performance Metrics component to the page.

 **Note:** This component is not available on the contact record page.

- b. Click anywhere on the component to select it.
- c. In the Properties pane, under Metrics, click **Select**.
- d. Select the metrics that you want to add to the component, and click **OK**.
You can select up to six metrics.
- e. If you use the Producer Policy Assignment object to map both a single producer to a policy and multiple producers to a policy, select **Include policies with multiple producers**.

3. Save your changes.

SEE ALSO:

[Include Multi-Producer Policies in Metrics and Charts](#)

[Manage Custom Report Types](#)

Manage Producers' Life Events

Your sales managers can now see producers' life events at a glance when you add the Life Events or Business Milestones component to the contact record page.

1. On the contact record page, from Setup, select **Edit Page**.
2. Drag the Life Events or Business Milestones component to the page.
3. Save your changes.

SEE ALSO:

[Work with Life Events and Business Milestones](#)

EDITIONS

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

Provide Easy Access to Producer Information

Your sales managers can easily view key information about their producers from multiple objects, without going through multiple related lists.

1. On the account or contact record page, from Setup, select **Edit Page**.
2. Drag the Relationship Card component to the page.
3. Click anywhere on the component to select it.
4. In the Properties pane, under Card Types, click **Select**.
5. Select **Producer Account Configuration** or **Producer Contact Configuration**, depending on the record page you are on.
6. Save your changes.

On a distributor's record page (Account), sales managers see one card for each producer working with that distributor. On a producer's record page (Contact), they see one card for the producer.

EDITIONS

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

Producer Cards	
Alishia Sergi Title: Agent Email: aliciasergi@gmail.com Producer ID: PhanHomePRL1LLa0 Producer Type: Partner Agent License Class: Managing General Agent Licensed LOA: Accident & Health or Sickness Authorized LOA: Accident & Health or Sickness	Amber Monarrez Title: Agent Email: ambermonarrez@gmail.com Producer ID: PhanHomePRL1LLa2 Producer Type: Independent Agent(Contractor) License Class: Managing General Agent Licensed LOA: Property Authorized LOA: Property
Mark Thompson Title: Agent Email: markthompson@gmail.com Producer ID: Producer 01 Producer Type: Partner Agent License Class: Insurance Producer, Managing General Agent Licensed LOA: Property, Casualty Authorized LOA: Casualty	

This table lists the labels on a producer card and their source fields.

Label	Description	Source Field
Title	Title of the producer, such as Agent.	Contact.Title
Email	Producer's email address.	Contact.Email
Producer ID	A unique identifier for the producer.	Producer.Name
Producer Type	Type of the producer, such as Partner Agent, Captive Agent, or Independent Agent.	Producer.Type
License Class	The class that the distributor's license belongs to, such as Insurance Producer, Managing General Agent, or Public Adjuster.	BusinessLicense.LicenseClass
Licensed LOA	The line of authority (LOA) that the producer has a license for. A producer can have licenses for multiple LOAs, such as Property, Casualty, and Health.	BusinessLicense.LineOfAuthority
Authorized LOA	The line of authority for which the insurance company has authorized the producer to act as its agent.	BusinessLicense.LineOfAuthority WHERE LineOfAuthority IS IN DistributorAuthorization

Include Multi-Producer Policies in Metrics and Charts


Include policies with multiple producers in your calculations to ensure that metrics and charts show accurate policy and premium figures. By default, the policy-related metrics and charts include only the policies that are assigned to single producers.


1. On the home page or the record page, from Setup, select **Edit Page**.
2. Click anywhere on the component that contains the metrics or charts to select it.
Here are the components that include policy-related metrics or report charts:
 - Insurance Distributor Performance Metrics
 - Insurance Agent Performance Metrics
 - Insurance Agent Action Items
 - Insurance Agent Reports

EDITIONS

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

3. In the Properties pane, select **Include policies with multiple producers**.

 **Note:** Select this option only if you use the Producer Policy Assignment object to map both a single producer to a policy and multiple producers to a policy. After you select this option, metric and chart calculations use only the mappings from the Producer Policy Assignment object. They ignore the lookup from the Insurance Policy object to the Producer object.

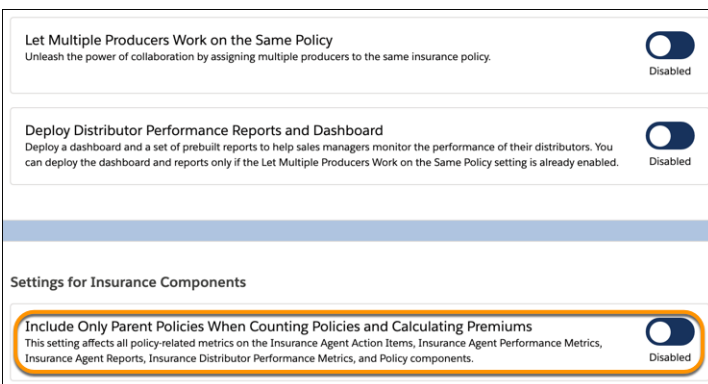
 **Note:** This option is not available for the Distributor Performance Dashboard. The reports on the Distributor Performance Dashboard always include the policies with multiple producers.

4. Save your changes.

Choose an Option for Metrics Calculations for Multiline Policies

Include only parent policies or both parent and child policies in metrics calculations, depending on how premiums are populated for multiline policies. For example, if premiums are populated for child policies and also aggregated at the parent level, then include only parent policies in calculations. By default, metrics count policies and premiums at both parent and child levels.

1. From Setup, in the Quick Find box, enter *Insurance Settings*, and then select **Insurance Settings**.
2. Enable **Include Only Parent Policies When Counting Policies and Calculating Premiums**.



Let Multiple Producers Work on the Same Policy
Unleash the power of collaboration by assigning multiple producers to the same insurance policy. Disabled

Deploy Distributor Performance Reports and Dashboard
Deploy a dashboard and a set of prebuilt reports to help sales managers monitor the performance of their distributors. You can deploy the dashboard and reports only if the Let Multiple Producers Work on the Same Policy setting is already enabled. Disabled

Settings for Insurance Components

Include Only Parent Policies When Counting Policies and Calculating Premiums
This setting affects all policy-related metrics on the Insurance Agent Action Items, Insurance Agent Performance Metrics, Insurance Agent Reports, Insurance Distributor Performance Metrics, and Policy components. Disabled

 **Note:** This change affects all policy-related metrics on the Insurance Agent Action Items, Insurance Agent Performance Metrics, Insurance Agent Reports, Insurance Distributor Performance Metrics, and Policy components.

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 Experience Cloud and knowledge management features to share knowledge articles with other agents and insurance carriers.

EDITIONS

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

EDITIONS

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

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 Financial Services Community User permission set.

Grant Users Access to Producer and Insurance Policy Records

To view the metrics and charts on the portal home page, portal users need access to records in the Producer and Insurance Policy objects.

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 *Digital Experiences*, and then select **All Sites**.
2. Click **New**.
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.

EDITIONS

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

Grant Users Access to the Portal

To access the features available in the portal, users need the Financial Services 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 **Financial Services Community User**, and then click **Add**.
5. Save your changes.

EDITIONS

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



Note: Assigning the Financial Services Community User permission set automatically assigns the user a Financial Services 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 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.

Grant Users Access to Producer and Insurance Policy Records

To view the metrics and charts on the portal home page, portal users need access to records in the Producer and Insurance Policy objects.

Grant your portal users access to Producer and Insurance Policy records that are associated with their accounts or contacts. One of the ways to do that is to use Sharing Sets.

EDITIONS

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

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.

EDITIONS

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

[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 or contact 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.

[Insurance Policies and Claims](#)

Depending on the page it's added on, the Policy component shows an account's or household's policies, claims, and other related details. You can add multiple instances of the Policy component on an account or household page and customize each instance to show a different set of information.

[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.

[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.

1. On the Insurance Agent Console home page, from Setup, select **Edit Page**.
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.

EDITIONS

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

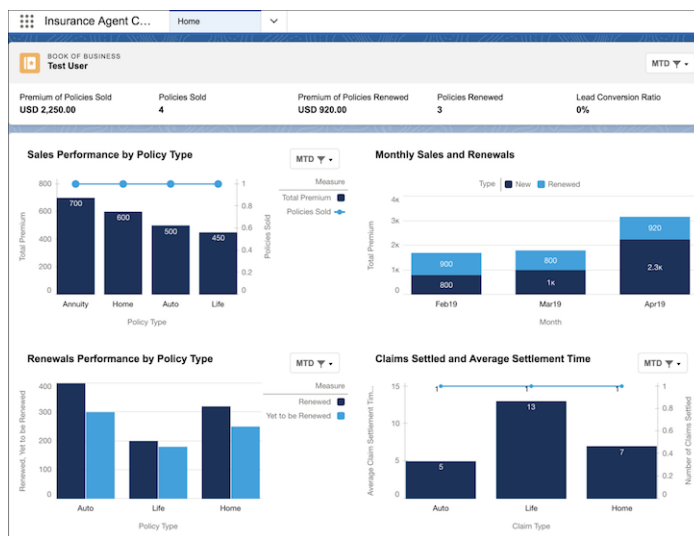
7. In the Properties pane, choose up to four metrics to show on the home page.
8. Select a time period.



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 or contact 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.

SEE ALSO:

[Work with Life Events and Business Milestones](#)

EDITIONS

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

Insurance Policies and Claims

Depending on the page it's added on, the Policy component shows an account's or household's policies, claims, and other related details. You can add multiple instances of the Policy component on an account or household page and customize each instance to show a different set of information.

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.

[Show the Most Relevant Policy and Claim Details on the Policy Component](#)

The Policies component shows policies and claims to help agents plan their day-to-day work, stay on top of their targets, and better serve their clients. You can choose which policy fields to show on the Policy component by customizing the Insurance Policies related list on the account page layout. You can choose which claim fields to show on the Policy component by customizing the Claims related list on the insurance policy page layout.

[Choose the Policy and Claim Details to Show on Hover](#)

When you hover over a policy or claim on the Policy component, an expanded lookup card displays the key fields from the policy or claim record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

[Show All Policies or Only Owned Policies](#)

On a business account or person account page, by default, the Policy component shows only the policies that the client owns. It doesn't show the policies in which the client is a participant. Similarly, on a household page, the Policy component shows only the policies that the household members own. It doesn't show the policies in which household members are participants.

[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.

[Show a Policy's Parent and Child Policies](#)

Enable policy hierarchy to give agents easy access to a policy's parent or child policies right from the list of policies on the client record page. It's easier for agents to track policies with a hierarchical view available at a glance.

[Filter Policies by Policy Type](#)

When you add multiple instances of the Policy component on a page, you can show different details on each instance. For example, you can show a different set of policy types on each instance by including or excluding policy types. When you exclude a policy type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

[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.

[Filter Policies by Policy Record Type](#)

When you add multiple instances of the Policy component on a page, you can show different details on each instance. For example, you can show a different set of policies on each instance by including or excluding policy record types. When you exclude a policy record type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

[Hide Policies' Related Claims](#)

Hide the claims list for policies that you don't want to show or when you don't have the data. For example, you can have two instances of the Policy component on the policyholder record page—one for your policies and another for your competitors' policies. Hide the claims list for competitors' policies because it's not relevant for your agents.

[View an Account's or Household's Claims History](#)

Agents can use the All Claims link on the Policy component to view the claims associated with an account or household. The link shows all claims from all policies regardless of claim status or policy owner.

[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.

[Define Custom Link Texts for the List of Policies or Claims Link](#)

Help insurance agents easily navigate to clients' policies and claims. You can change the default link texts and craft custom link texts, for example, using localized labels to suit agents' needs.

[Work with Quick Actions on Policy Records](#)

Insurance agents can accomplish different policy-related tasks without switching tabs. They can invoke standard and custom quick actions on policy records from within the Policy component.

[Show Related Records from Multiple Policy-Related Objects](#)

Give insurance agents a comprehensive view of clients' policies and claims. You can customize the Policy component to add multiple policy-related objects as related lists for each policy record. The component displays the related records from these objects on separate tabs.

[Show Policy-Related Details in an Enhanced Related List](#)

In the Policy component you can show up to 10 columns, resize and sort your columns, perform mass actions, and wrap text when you select the Enhanced Related List. By default, the Policy component uses the Basic Related List type to show policies' related list.

[Filter Policies to See Only Inactive Policies](#)

It's no longer necessary to scroll through the list of policies to identify clients' inactive policies. The Policy component shows all inactive policies.

[Path Settings for Insurance Policy and Claim Objects](#)

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

[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.

[Use Custom Icons for Policy Types](#)

You can change the default icon associated with a policy type. Upload an SVG file to replace the icon.

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.

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

The Policies component shows policies and claims to help agents plan their day-to-day work, stay on top of their targets, and better serve their clients. You can choose which policy fields to show on the Policy component by customizing the Insurance Policies related list on the account page layout. You can choose which claim fields to show on the Policy component by customizing the Claims related list on the insurance policy page layout.

EDITIONS

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

1. Choose the policy fields to show on the Policy component.
 - a. From Setup, open **Object Manager**.
 - b. In the Quick Find box, enter *Person Account*, and then select **Person Account**.
 - c. Click **Page Layouts**, and then select **Person Account Layout**.
 - d. On the palette, select **Related Lists**.
 - e. Under Related Lists, double-click the **Insurance Policies** related list or click the wrench icon (🔧).
 - f. 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.
 - g. Click **OK**. Your changes aren't saved until you save the page layout.
 - h. Save the page layout.
2. Choose the claim fields to show on the Policy component.
 - a. From Setup, open **Object Manager**.
 - b. In the Quick Find box, enter *Insurance Policy*, and then select **Insurance Policy**.
 - c. Click **Page Layouts**, and then select **Insurance Policy Layout**.
 - d. On the palette, select **Related Lists**.
 - e. Under Related Lists, double-click the **Claims** related list or click the wrench icon (🔧).
 - f. 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.
 - g. Click **OK**. Your changes aren't saved until you save the page layout.
 - h. Save the page layout.

Choose the Policy and Claim Details to Show on Hover

When you hover over a policy or claim on the Policy component, an expanded lookup card displays the key fields from the policy or claim record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

EDITIONS


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

1. Choose the policy fields to show in the expanded lookup card.
 - a. From Setup, open **Object Manager**.
 - b. Click **Insurance Policy**, and select **Compact Layouts**.
 - c. Clone the System Default layout, or click **New** to create a compact layout.
 - d. Enter a label for the compact layout, and add the fields to include.
 - e. Sort the fields in the order that you want them displayed by clicking **Up** or **Down** arrow.



Tip: Put the Policy Number field first to provide users context when they hover over a policy.

- f. Save the layout.
 - g. Click **Compact Layout Assignment**, and then click **Edit Assignment**.
 - h. From the Primary Compact Layout list, select your compact layout.
 - i. Save your changes.
2. Choose the claim fields to show in the expanded lookup card.
 - a. From Setup, open **Object Manager**.
 - b. Click **Claim**, and select **Compact Layouts**.
 - c. Clone the System Default layout, or click **New** to create a compact layout.
 - d. Enter a label for the compact layout, and add the fields to include.
 - e. Sort the fields in the order that you want them displayed by clicking **Up** or **Down** arrow.


 **Tip:** Put the Claim Number field first to provide users context when they hover over a claim.

 - f. Save the layout.
 - g. Click **Compact Layout Assignment**, and then click **Edit Assignment**.
 - h. From the Primary Compact Layout list, select your compact layout.
 - i. Save your changes.

Show All Policies or Only Owned Policies

On a business account or person account page, by default, the Policy component shows only the policies that the client owns. It doesn't show the policies in which the client is a participant. Similarly, on a household page, the Policy component shows only the policies that the household members own. It doesn't show the policies in which household members are participants.


You can edit your account or household page, and configure the Policy component to include one or more participant roles such as beneficiary, driver, or subscriber. When you do that, the policy list includes both the owned policies and the policies where the client or the household members are participants.

And, at the top of the list, click the filter . You see the Show only owned policies option. Select this option to view only the owned policies and exclude any participant policies.

EDITIONS


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

Policies and Claims




PREMIUM PAID

\$33,000.00



OPEN CLAIMS


[Adams, Auto Policy, 9/10/2019 3:54 AM](#)




UP FOR RENEWAL


-

Show only owned policies




Expand All






Auto (5+)



[AP-0001](#)

(Owner)

Policy Number	Policy Type	Premium Amount	Effective Date
AP-0001	Auto	\$1,554.00	



[AP-000123](#)

(Owner)

Policy Number	Policy Type	Premium Amount	Effective Date
AP-000123	Auto	\$1,554.00	

The policies are grouped by policy type. The policies that don't have a policy type are grouped under the Others policy type. A group can show a maximum of five policies. Use the All Policies link at the bottom of the Policy component to view all the policies owned by the client or the household.

If you don't select the Show only owned policies option, you see two links at the bottom of the list: All Owned Policies and Other Policies.

> AP-0001234 (Owner)			
Policy Number AP-0001234	Policy Type Auto	Premium Amount \$1,354.00	Effective Date
> AP-002 (Owner)			
Policy Number AP-002	Policy Type Auto	Premium Amount \$2,000.00	Effective Date
> AP-0001235 (Owner)			
Policy Number AP-0001235	Policy Type Auto	Premium Amount \$1,354.00	Effective Date
All Owned Policies Other Policies			

- For an account, the All Owned Policies link opens the Insurance Policies list view, which shows all the policies that the client owns. The Other Policies link opens the Insurance Policy Participants list view, which shows all participant records for the client.
- For a household, the All Owned Policies link opens the Household Insurance Policies list view, which shows all the policies that the household members own. The Other Policies link opens the Household Insurance Policy Participants list view, which shows all participant records for household members.

SEE ALSO:

[Add Policy and Life Events or Business Milestones Components to Your Account Record Page](#)

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.

 **Note:** The policies that don't have a policy type are grouped under the Others policy type.

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

KPI 3

Up for Renewal

Choose Participant Role

Select...

☐ Expand all policy types by default


Set Component Visibility

Filters

+ Add Filter

EDITIONS

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

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

Show a Policy's Parent and Child Policies

Enable policy hierarchy to give agents easy access to a policy's parent or child policies right from the list of policies on the client record page. It's easier for agents to track policies with a hierarchical view available at a glance.

Important: Before you perform these steps, ensure that the Child Policies related list is added to the Insurance Policy page layout.

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 **Show policy hierarchy**.

4. Save your changes.

Agents can see the parent policy (1) and child policies (2) for a multiline policy in one place, without going through multiple related lists.

Tip: Depending on its position on the record page (main region or sidebar), the Policy component shows a maximum of five or two child policies. To view the full list of child policies, click **...**.

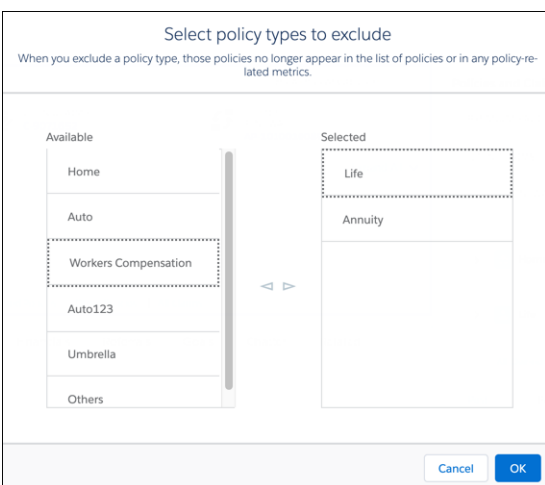
EDITIONS

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

Filter Policies by Policy Type

When you add multiple instances of the Policy component on a page, you can show different details on each instance. For example, you can show a different set of policy types on each instance by including or excluding policy types. When you exclude a policy type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

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 Select policy types to exclude, click **Select**.
4. Select the policy types that you want to exclude, and click **OK**.



5. Save your changes.

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**.

EDITIONS

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

EDITIONS

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

Set Policy Types Order

Select an available policy type and move it to the Selected list. You can reorder selected policy types by dragging them up or down the list. By default, policy types appear in alphabetical order.

Available

Home

Auto

Life

Annuity

Commercial Auto

Commercial Property

Selected

Cancel

OK

- 5. Save your changes.

Filter Policies by Policy Record Type

When you add multiple instances of the Policy component on a page, you can show different details on each instance. For example, you can show a different set of policies on each instance by including or excluding policy record types. When you exclude a policy record type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

- 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 Select policy record types to exclude, click **Select**.
- 4. Select the policy record types that you want to exclude, and click **OK**.

EDITIONS

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

Select policy record types to exclude

When you exclude a policy record type, those policies no longer appear in the list of policies or in any policy-related metrics.

Available

AYA

BAXA

Competitor 1

Competitor 2

Selected

Master

Competitor

Cancel

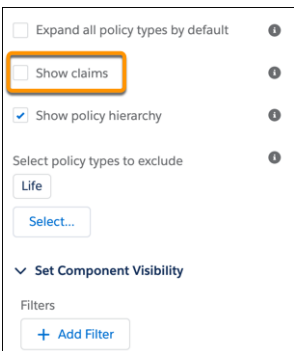
OK

- 5. Save your changes.

Hide Policies' Related Claims

Hide the claims list for policies that you don't want to show or when you don't have the data. For example, you can have two instances of the Policy component on the policyholder record page—one for your policies and another for your competitors' policies. Hide the claims list for competitors' policies because it's not relevant for your agents.

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, deselect **Show claims**.



The screenshot shows the 'Properties' pane for a Policy component. The 'Show claims' checkbox is unchecked and highlighted with an orange box. Other options include 'Expand all policy types by default' (unchecked), 'Show policy hierarchy' (checked), and a 'Select policy types to exclude' section with a 'Life' button and a 'Select...' button. At the bottom, there is a 'Set Component Visibility' section with a 'Filters' label and an '+ Add Filter' button.

4. Save your changes.

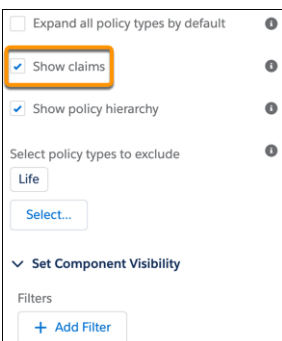
EDITIONS

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

View an Account's or Household's Claims History

Agents can use the All Claims link on the Policy component to view the claims associated with an account or household. The link shows all claims from all policies regardless of claim status or policy owner.

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 **Show claims**.



The screenshot shows the 'Properties' pane for a Policy component. The 'Show claims' checkbox is checked and highlighted with an orange box. Other options include 'Expand all policy types by default' (unchecked), 'Show policy hierarchy' (checked), and a 'Select policy types to exclude' section with a 'Life' button and a 'Select...' button. At the bottom, there is a 'Set Component Visibility' section with a 'Filters' label and an '+ Add Filter' button.

4. Save your changes.

EDITIONS

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

Policies and Claims		
 PREMIUM PAID \$18,656.00	 OPEN CLAIMS CL202022-001	 CLAIMS PAID \$5,200.00
>  Agriculture CVR (1)		
>  Auto (2)		
>  Property (2)		
All Owned Policies Other Policies All Claims		

Rachel Adams

Claims

▼

×

Person Accounts > Mrs. Rachel Adams

Claims

New

3 items • Updated 3 minutes ago

⚙

↺

▼

	Claim Number	Claim Type	Status	Approved Amount	
1	C-9071652	Auto	Active	\$4,000.00	▼
2	C-9071664	Home	Closed	\$12,000.00	▼
3	C-9071682	Auto	Settled	\$7,000.00	▼

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 select **Claim**.
3. Click **Fields & Relationships**, and 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.

EDITIONS

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

EDITIONS

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

Define Custom Link Texts for the List of Policies or Claims Link


Help insurance agents easily navigate to clients' policies and claims. You can change the default link texts and craft custom link texts, for example, using localized labels to suit agents' needs.

On the Policy component, you see links at the bottom of the component that take you to the list of policies or list of claims. The links shown on the component vary depending on the component settings. For example, when you edit your account or household page, and configure the Policy component to include one or more participant roles such as beneficiary, driver, or subscriber, you see the All Policies link at the bottom of the Policy component. If you haven't set the Show only owned policies filter on the component, then you see two links at the bottom of the list: All Owned Policies and Other Policies. You can override the default text of these links.

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, depending on the record page, override the default value of the text fields, Custom Link Text for All Owned Policies, Custom Link Text for Other Policies, Custom Link Text for All Policies, or Custom Link Text for All Claims.
4. Save your changes.

Work with Quick Actions on Policy Records

Insurance agents can accomplish different policy-related tasks without switching tabs. They can invoke standard and custom quick actions on policy records from within the Policy component.

On the Policy component, expand the policy group, and click the  icon at the top-right corner of the policy record. Click the required action on the dropdown menu to invoke it.

Show Related Records from Multiple Policy-Related Objects

Give insurance agents a comprehensive view of clients' policies and claims. You can customize the Policy component to add multiple policy-related objects as related lists for each policy record. The component displays the related records from these objects on separate tabs.

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 Select policy-related objects for tabs, click **Select**.
4. Move the required objects to the Selected list, reorder them by dragging them up or down the list, and click **OK**.

The order of the objects determines the order of the tab on the Policy component.

5. Save your changes.

EDITIONS

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

EDITIONS

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EDITIONS

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Show Policy-Related Details in an Enhanced Related List

In the Policy component you can show up to 10 columns, resize and sort your columns, perform mass actions, and wrap text when you select the Enhanced Related List. By default, the Policy component uses the Basic Related List type to show policies' related list.

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, select **Show Enhanced List**.
4. Save your changes.

Filter Policies to See Only Inactive Policies

It's no longer necessary to scroll through the list of policies to identify clients' inactive policies. The Policy component shows all inactive policies.

On the Policy component, at the top of the list, click the filter  and select **Show only inactive policies**.

Path Settings for Insurance Policy and Claim Objects

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

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](#)

EDITIONS

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

EDITIONS

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EDITIONS


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EDITIONS

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

Use Custom Icons for Policy Types

You can change the default icon associated with a 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. Select **Insurance Policies**.
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.

EDITIONS

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

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:

[Action Plans](#)

EDITIONS

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

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](#)

Review these points to better understand the information that appears in charts and metrics on various Lightning components and in the deployed distribution performance reports.

[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.

EDITIONS

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

Considerations for Metrics and Charts

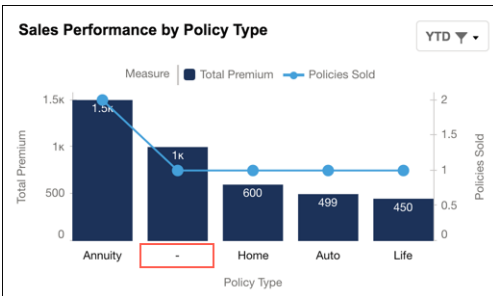
Review these points to better understand the information that appears in charts and metrics on various Lightning components and in the deployed distribution performance reports.

Report Charts on the Insurance Agent Reports Component

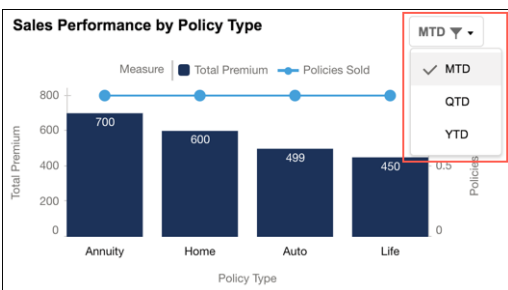
- The charts group policies and policy premiums by policy type. Policies without a policy type are grouped under a type represented by a hyphen (-).

EDITIONS

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



- By default, the MTD (Month to Date) filter is applied to the 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.
- The sale-related charts include all new policies irrespective of whether they are active or inactive.
- When calculating the renewal-related 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 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 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 drawing the Sales Performance by Policy Type chart, a policy is counted only when it meets all of 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 this table to learn how charts are calculated.


 **Note:** If you select the Include policies with multiple producers option for charts, chart calculations use the Producer Policy Assignment object to fetch both single-producer and multi-producer policies. They ignore the lookup from the Insurance Policy object to the Producer object.

Table 7: Report Charts on the Insurance Agent Reports Component

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
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.	<p>Number of policies sold = COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)</p> <p>Total premium = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)</p>	<p>Number of policies sold = COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)</p> <p>Total premium = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)</p>
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.	<p>Premium for policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True, GROUP BY PolicyType</p> <p>Premium for policies yet to be renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId =</p>	<p>Premium for policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True, GROUP BY PolicyType</p> <p>Premium for policies yet to be renewed = SUM (GrossWrittenPremium) FROM</p>

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		Current User AND (RenewalDate OR FinalRenewalDate IN Selected Time Period) AND DateRenewed = NULL AND IsActive = True, GROUP BY PolicyType	InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = 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.	<p>Policies sold = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = 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)</p> <p>Policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = 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)</p>	<p>Policies sold = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = 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)</p> <p>Policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = 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)</p>
Average Opportunity Closure Time	The average time the agent took to close an opportunity. The	AVG (SourceOpportunity.CloseDate -	AVG (SourceOpportunity.CloseDate - SourceOpportunity.CreatedDate)

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
	records are grouped by policy type.	SourceOpportunity.CreatedDate) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND SourceOpportunity.CloseDate IN Last 6 Months, GROUP BY Calendar_Month (SourceOpportunity.CloseDate), ORDER BY Calendar_Month (SourceOpportunity.CloseDate)	FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = 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	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.	Cases closed = COUNT (Id) FROM Case WHERE OwnerId = Current User AND Status = Closed AND ClosedDate IN Selected Time Period, ORDER BY Type Average closure time = AVG (ClosedDate - CreatedDate) WHERE Status = Closed AND OwnerId = Current User AND ClosedDate IN Selected Time Period, ORDER BY Type	Same as Without ProducerPolicyAssignment
Claims Settled and Average Settlement Time	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.	Claims settled = COUNT (Id) FROM Claim WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType Average settlement time = AVG (InitiationDate - FinalizedDate) WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType	Same as Without ProducerPolicyAssignment

Metrics on the Insurance Agent Performance Metrics and Insurance Distributor Performance Metrics Components

- By default, the MTD (Month to Date) filter is applied to the metrics. 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.

BOOK OF BUSINESS Test User		
Premium of Policies Sold	Policies Sold	Premium of Policies Renewed
USD 2,249.00	4	USD 920.00

- The sale-related metrics include all new policies irrespective of whether they are active or inactive.
- When calculating the renewal-related metrics, 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 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 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 of 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 this table to learn how metrics are calculated.


-  **Note:** If you select the Include policies with multiple producers option for metrics, metric calculations use the Producer Policy Assignment object to fetch both single-producer and multi-producer policies. They ignore the lookup from the Insurance Policy object to the Producer object.

Table 8: Insurance Agent Performance Metrics

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Policies Sold	The number of policies sold by the insurance agent.	COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Premium of Policies Sold	The sum of the premium for the policies sold by the insurance agent.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period
Policies Renewed	The number of policies renewed by the insurance agent.	COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True
Premium of Policies Renewed	The sum of the premium for the policies renewed by the insurance agent.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True
Policy Renewal Rate	The percentage of policies that were renewed.	COUNT (InsurancePolicy.Id) WHERE Producer.InternalUserId = Current User AND DateRenewed OR PreviousRenewalDate IN Selected Time Period AND IsActive = True / (COUNT (InsurancePolicy.Id) WHERE Producer.InternalUserId = Current User AND DateRenewed OR PreviousRenewalDate IN Selected Time Period AND IsActive = True + COUNT (InsurancePolicy.Id) WHERE Producer.InternalUserId = Current User AND RenewalDate	COUNT (InsurancePolicy.Id) WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True / COUNT (InsurancePolicy.Id) WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		OR FinalRenewalDate IN Selected Time Period AND DateRenewed = NULL AND IsActive = True)	PreviousRenewalDate IN Selected Time Period) AND IsActive = True+COUNT (InsurancePolicy.Id) WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND RenewalDate OR FinalRenewalDate IN Selected Time Period AND DateRenewed = NULL AND IsActive = True)
Lead Conversion Ratio	The percentage of leads that were converted into opportunities.	% Leads WHERE OwnerId = Current User AND IsConverted = True AND CreatedDate IN Selected Time Period	Same as Without ProducerPolicyAssignment
Cases Closed	The number of cases closed by the service rep.	COUNT (Id) FROM Case WHERE OwnerId = Current User AND Status = Closed AND ClosedDate IN Selected Time Period	Same as Without ProducerPolicyAssignment
Case Closure Time	The average number of days the service rep took to close a case.	AVG (ClosedDate - CreatedDate) WHERE Status = Closed AND OwnerId = Current User AND ClosedDate IN Selected Time Period	Same as Without ProducerPolicyAssignment
Claims Settled	The number of claims settled by the service rep.	COUNT (Id) FROM Claim WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period	Same as Without ProducerPolicyAssignment
Claim Settlement Time	The average number of days the service rep took to settle a claim.	AVG (InitiationDate - FinalizedDate) WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period	Same as Without ProducerPolicyAssignment

Table 9: Distributor Performance Metrics on a Sales Manager's Home Page

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Policies Sold	The number of policies sold by all distributors that the sales manager owns.	COUNT (Id) FROM InsurancePolicy WHERE	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		Producer.Account.OwnerId = Current User AND IsRenewedPolicy = FALSE AND SaleDate IN Selected Time Period	ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User) AND IsRenewedPolicy = FALSE AND SaleDate IN Selected Time Period
Premium of Policies Sold	The sum of the premium for the policies sold by all distributors that the sales manager owns.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.Account.OwnerId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period
Policies Renewed	The number of policies renewed by all distributors that the sales manager owns.	COUNT (Id) FROM InsurancePolicy WHERE Producer.Account.OwnerId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True
Premium of Policies Renewed	The sum of the premium for the policies renewed by all distributors that the sales manager owns.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.Account.OwnerId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True
Policy Renewal Rate	Ratio of policies renewed to total policies up for renewal during a specific time period.	COUNT (InsurancePolicy.Id) WHERE	COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		<p>Producer.Account.OwnerId = Current User AND (DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed = NULL)) AND IsActive=True / COUNT (InsurancePolicy.Id) WHERE Producer.Account.OwnerId = Current User AND (DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed = NULL)) AND IsActive=True + COUNT (InsurancePolicy.Id) WHERE Producer.Account.OwnerId = Current User AND (RenewalDate IN Selected Time Period OR FinalRenewalDate IN Selected Time Period) AND IsActive=True AND DateRenewed = NULL</p>	<p>ProducerPolicyAssignment WHERE Producer.Account.ownerId = Current User AND (InsurancePolicy.DateRenewed IN Selected Time Period OR (InsurancePolicy.PreviousRenewalDate = IN Selected Time Period AND InsurancePolicy.DateRenewed= null)) AND IsActive=True /COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.ownerId = Current User AND (InsurancePolicy.DateRenewed IN Selected Time Period OR (InsurancePolicy.PreviousRenewalDate = IN Selected Time Period AND InsurancePolicy.DateRenewed= null)) AND IsActive=True + COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.ownerId = Current User AND (InsurancePolicy.RenewalDate IN Selected Time Period OR InsurancePolicy.FinalRenewalDate IN Selected Time Period) AND InsurancePolicy.DateRenewed= null AND InsurancePolicy.IsActive=True)</p>
Policies Canceled	The number of policies that were canceled.	COUNT(Id) FROM InsurancePolicy WHERE Producer.Account.OwnerId = Current User AND CancellationDate IN Selected Time Period	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User AND CancellationDate IN Selected Time Period)

Table 10: Distributor Performance Metrics on a Distributor's (Account) Record Page

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Policies Sold	The number of policies sold by the distributor.	COUNT (Id) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period)
Premium of Policies Sold	The sum of the premium for the policies sold by the distributor.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period)
Policies Renewed	The number of policies renewed by the distributor.	COUNT (Id) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True)
Premium of Policies Renewed	The sum of the premium for the policies renewed by the distributor.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True)
Policy Renewal Rate	Ratio of policies renewed to total policies up for renewal during a specific time period.	COUNT (InsurancePolicy.Id) WHERE Producer.AccountId =	COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM


Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		'This Account' AND (DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed = NULL)) AND IsActive=True / COUNT (InsurancePolicy.Id) WHERE Producer.AccountId = 'This Account' AND (DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed = NULL)) AND IsActive=True + COUNT (InsurancePolicy.Id) WHERE Producer.AccountId = 'This Account' AND (RenewalDate IN Selected Time Period OR FinalRenewalDate IN Selected Time Period) AND IsActive=True AND DateRenewed = NULL	ProducerPolicyAssignment WHERE Producer.AccountId = Current User AND (InsurancePolicy.DateRenewed IN Selected Time Period OR (InsurancePolicy.PreviousRenewalDate = IN Selected Time Period AND InsurancePolicy.DateRenewed= null)) AND IsActive=True /COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = Current User AND (InsurancePolicy.DateRenewed IN Selected Time Period OR (InsurancePolicy.PreviousRenewalDate = IN Selected Time Period AND InsurancePolicy.DateRenewed= null)) AND IsActive=True + COUNT (InsurancePolicy.Id) WHERE ID IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = Current User AND (InsurancePolicy.RenewalDate IN Selected Time Period OR InsurancePolicy.FinalRenewalDate IN Selected Time Period) AND InsurancePolicy.DateRenewed= null AND InsurancePolicy.IsActive=True)
Policies Canceled	The number of policies that were canceled.	COUNT(Id) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND CancellationDate IN Selected Time Period	COUNT(Id) FROM InsurancePolicy WHERE ID IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND InsurancePolicy.CancellationDate IN Selected Time Period)
Total Premiums of Policies Canceled	The sum of the premium for the policies that were canceled.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.AccountId = This	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE ID IN (SELECT InsurancePolicyId

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		Account AND CancellationDate IN Selected Time Period	FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND InsurancePolicy.CancellationDate IN Selected Time Period)
Average Policies Sold per Customer	The average number of policies that the distributor sold to each customer.	Count (Id) FROM InsurancePolicy WHERE Producer.AccountId = 'This Account' AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false / COUNT_DISTINCT (NameInsuredId) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false	Count (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false) / COUNT_DISTINCT (NameInsuredId) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false)
Average Premium of Policies Sold	The average premium for all the policies that the distributor sold.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed= null) AND IsActive=True) / Count (Id) FROM InsurancePolicy WHERE Producer.AccountId = This Account AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND DateRenewed IN Selected Time Period OR (PreviousRenewalDate IN Selected Time Period AND DateRenewed= null) AND IsActive=True)) / Count (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.AccountId = This Account AND SaleDate IN Selected Time Period AND InsurancePolicy.IsRenewedPolicy = false)

Metrics on the Insurance Agent Action Items Component

- The policy-related metrics include only active policies.

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

 **Note:** If you select the Include policies with multiple producers option for metrics, metric calculations use the Producer Policy Assignment object to fetch both single-producer and multi-producer policies. They ignore the lookup from the Insurance Policy object to the Producer object.

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Cases Escalated	The number of escalated cases assigned to the agent.	COUNT (Id) FROM Case WHERE OwnerId = Current User AND IsEscalated = True	Same as Without ProducerPolicyAssignment
Open Cases	The number of open cases assigned to the agent.	COUNT (Id) FROM Case WHERE OwnerId = Current User AND IsClosed = False	Same as Without ProducerPolicyAssignment
Open Claims	The number of open claims assigned to the agent.	COUNT (Id) FROM Claim WHERE OwnerId = Current User AND IsClosed = False	Same as Without ProducerPolicyAssignment
Open Opportunities	The number of open opportunities assigned to the agent.	COUNT (Id) FROM Opportunity WHERE OwnerId = Current User AND IsClosed = False	Same as Without ProducerPolicyAssignment
Payment-Due Policies	The number of policies with payment due within the selected time period.	COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND PaymentDueDate = Selected Time Period AND IsActive = True	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND PaymentDueDate = Selected Time Period AND IsActive = True
Policies About to Lapse	The number of policies with final renewal date within the selected time period.	COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND FinalRenewalDate = Selected Time Period AND DateRenewed = NULL AND IsActive = True	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND FinalRenewalDate = Selected Time Period AND DateRenewed = NULL AND IsActive = True
Policies Up for Renewal	The number of policies with renewal date within the selected time period.	COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (RenewalDate = Selected Time Period OR FinalRenewalDate = Selected	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		Time Period) AND DateRenewed = NULL AND IsActive = True	(RenewalDate = Selected Time Period OR FinalRenewalDate = Selected Time Period) AND DateRenewed = NULL AND IsActive = True
Unread Leads	The number of leads assigned to the agent but not yet read by the agent.	COUNT (Id) FROM Lead WHERE OwnerId = Current User AND IsUnreadByOwner = True	Same as Without ProducerPolicyAssignment

Considerations for Policies and Claims

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

- 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.

KPI	Description	Calculation
Premium Paid	The sum of the active policy premiums.	SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE NameInsuredId = Current Account AND IsActive = TRUE
Up for Renewal	The list of active policies that are pending renewal in the next 90 days.	Policies FROM InsurancePolicy WHERE NameInsuredId = Current Account AND IsActive = TRUE AND RenewalDate in next 90 days, ORDER BY RenewalDate
Open Claims	User's open claims list.	Claims FROM Claim WHERE AccountId = Current Account AND IsClosed = FALSE, ORDER BY LastModifiedDate
Claims Paid	The sum of the approved and paid amount for all closed claims.	SUM (ApprovedAmount) FROM Claim WHERE AccountId = Current Account AND IsClosed = TRUE AND ApprovedAmount Is Not Null

EDITIONS

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

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.

EDITIONS

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

Enable Mortgage for Financial Services Cloud

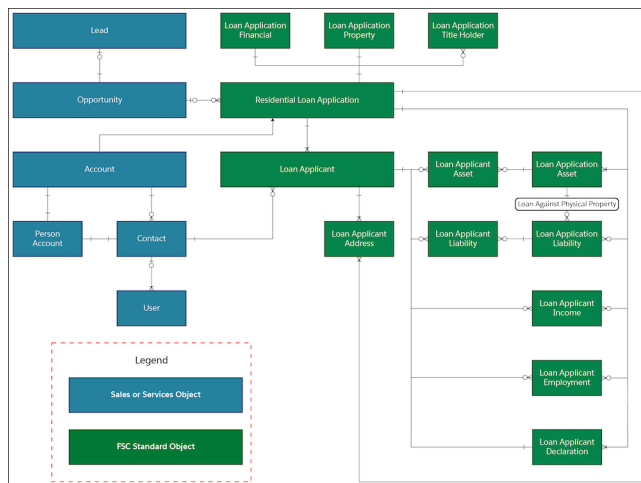
Mortgage for Financial Services Cloud includes a new data model for mortgage applications, new standard flow templates, and new flow screen components.

Mortgage for Financial Services Cloud's data model is based on the U.S. Uniform Residential Loan Application released in February 2019. The data model captures borrower information so you can share it across lines of business. The mortgage feature can be used with the Document Checklist Item object from Document Tracking and Approvals to collect and track required borrower documents.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



Give Your Users Access to Mortgage Features

Users such as loan officers and underwriters need different levels of access to mortgage-related objects, document checklist items, and flows. Use permission sets and profiles to set up the necessary access for your users.

Set Up Borrower Access to Mortgage Applications in Communities

Create and assign a profile to your customer communities and customize your community home and record detail pages.

Solution Kits for Mortgage

Salesforce solution kits are your go-to when you want to connect your clouds. Cross-cloud solutions help you deliver impactful, personalized experiences that address customer concerns in a digital, cost-effective manner.

Give Your Users Access to Mortgage Features

Users such as loan officers and underwriters need different levels of access to mortgage-related objects, document checklist items, and flows. Use permission sets and profiles to set up the necessary access for your users.

[Assign the Mortgage Permission Set](#)

Use permission sets to assign your users licenses to the mortgage feature and document checklist items.

[Create Enhanced Mortgage User Permission Sets](#)

Create permission sets to give your users appropriate access to system permissions.

[Create and Assign Mortgage User Profiles](#)

Create loan officer and underwriter profiles to give your users appropriate access to mortgage objects and document checklist items.

[Set Up Account Sharing](#)

Use sharing settings to control user access to mortgage records.

[Update Residential Loan Application Page Layout](#)

Add loan applicant and loan application objects to the related list section of the Residential Loan Application page layout.

[Create and Assign Role](#)

Before a loan officer can create a customer user, they must have a role assigned.

[Set Up Action and Recommendations List](#)

Create a list of flows to display to loan officers in the Actions and Recommendations list on residential loan application record detail pages.

[Define Mortgage Record Creation Settings](#)

Run the Create Financial Records process to generate financial records, such as financial accounts or property assets, from loan application data. Use the Mortgage Record Creation Settings to define which records are created when this process runs.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Assign the Mortgage Permission Set

Use permission sets to assign your users licenses to the mortgage feature and document checklist items.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. On the Permission Sets Setup page, click the name of the mortgage permission set with a Mortgage license that you want to assign.
3. Click **Manage Assignments** and then click **Add Assignments**.
4. Select the users who need access to the Mortgage license, click **Assign**, and click **Done**.
5. On the Permission Sets Setup page, click the name of the document checklist permission set with a Document Checklist license that you want to assign.
6. Click **Manage Assignments** and then click **Add Assignments**.
7. Select the users who need access to the Document Checklist license, click **Assign**, and click **Done**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create Enhanced Mortgage User Permission Sets

Create permission sets to give your users appropriate access to system permissions.

Financial Services Cloud ships with a Mortgage license and a Document Checklist license, but mortgage users need differing access to both mortgage and document checklist objects. Some mortgage users run flows and create community users. Create permission sets to assign necessary object and feature permissions to your different mortgage users.

[Create and Assign a Loan Officer Permission Set](#)

Create a permission set to give loan officers access to mortgage and document checklist features. The permissions set also grants access to mortgage and document checklist objects and other system permissions.

[Create and Assign an Underwriter Permission Set](#)

Create a permission set to give underwriters access to mortgage and document checklist features. The permissions set also grants access to mortgage and document checklist objects.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create and Assign a Loan Officer Permission Set

Create a permission set to give loan officers access to mortgage and document checklist features. The permissions set also grants access to mortgage and document checklist objects and other system permissions.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. On the Permission Sets Setup page, click **New**.
3. Name the permission set *Loan Officer*, set License to **None**, and then click **Save**.
4. On the Loan Officer Permission Set page, under Apps, click **App Permissions**, and click **Edit**.
5. Under Call Center, enable **Manage Customer Users**, and save.
6. In the drop-down list to the right of App Permissions, select **System Permissions** and then click **Edit**.
7. Under System, enable Run Flows, User license to access mortgage in Financial Services Cloud, and User license to access the Document Checklist features.
8. In the drop-down list to the right of System Permissions, select **Object Settings**.
9. In the Find Settings box, enter *Document Checklist Items*, click **Document Checklist Items**, and then click **Edit**.
10. Enable Read, Create, Edit, and Delete and click **Save**.
11. Repeat steps 11 and 12 for the remaining mortgage objects.
 - Loan Applicant Addresses
 - Loan Applicant Assets
 - Loan Applicant Declarations
 - Loan Applicant Employments
 - Loan Applicant Incomes
 - Loan Applicant Liabilities
 - Loan Applicants
 - Loan Application Assets

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- Loan Application Financials
- Loan Application Liabilities
- Loan Application Properties
- Loan Application Title Holders
- Residential Loan Applications

12. On the Loan Officer Permission Set page, click **Manage Assignments**, and then click **Add Assignments**.

13. Select the users you want to assign the loan officer permission set to and click **Assign**, and then click **Done**.

Create and Assign an Underwriter Permission Set

Create a permission set to give underwriters access to mortgage and document checklist features. The permissions set also grants access to mortgage and document checklist objects.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. On the Permission Sets Setup page, click **New**.
3. Name the permission set *Underwriter*, set License to **None**, and then click **Save**.
4. On the Underwriter Permission Set page, under System, click **System Permissions**, and then click **Edit**.
5. Under System, enable User license to access mortgage in Financial Services Cloud and User license to access the Document Checklist features.
6. Click **Save**.
7. On the Underwriter Permission Set page, in the Find Settings box, enter *Document Checklist Items*, click **Document Checklist Items**, and then click **Edit**.
8. Enable Read, Create, and Edit and then click **Save**.
9. On the Underwriter Permission Set page, in the Find Settings box, enter *Loan Applicant Addresses*, click **Loan Applicant Addresses**, and then click **Edit**.
10. Enable Read and click **Save**.
11. Repeat steps 9 and 10 for the remaining mortgage objects.
 - Loan Applicant Assets
 - Loan Applicant Declarations
 - Loan Applicant Employments
 - Loan Applicant Incomes
 - Loan Applicant Liabilities
 - Loan Applicants
 - Loan Application Assets
 - Loan Application Financials
 - Loan Application Liabilities
 - Loan Application Properties
 - Loan Application Title Holders
 - Residential Loan Applications.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

12. On the Underwriter Permission Set page, click **Manage Assignments**, and then click **Add Assignments**.
13. Select the users you want to assign the underwriter permission set to and click **Assign**, and then click **Done**.

Create and Assign Mortgage User Profiles

Create loan officer and underwriter profiles to give your users appropriate access to mortgage objects and document checklist items.

1. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
2. On the Profiles page, clone the Standard User profile.
3. On the Clone Profile page, enter *Loan Officer* for the cloned profile name and save.
4. From Setup, select **Users > Users**.
5. Click **Edit** next to the user that you want to assign the loan officer profile to.
6. On the User Edit page, select the loan officer profile from the Profile drop-down list and click **Save**.
7. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
8. On the Profiles page, clone the Standard User profile.
9. On the Clone Profile page, enter *Underwriter* for the cloned profile name and save.
10. From Setup, select **User > User**.
11. Click **Edit** next to the user that you want to assign the underwriter profile to.
12. On the User Edit page, select the underwriter profile from the Profile drop-down list and click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Set Up Account Sharing

Use sharing settings to control user access to mortgage records.

Set up sharing for mortgage object records using an account sharing model. This can include account team, sharing rules, or a role hierarchy.



Example: This examples sets up Account Teams for sharing.

1. From Setup, in the Quick Find box, enter *Account Teams*, and then select **Account Teams**.
2. If account teams are disabled, enable account teams for your organization.
 - a. On the Account Team Setup page, click **Enable Account Teams**, select **Account Teams Enabled**, and then click **Save**.
 - b. On the Page Layout Selection page, select the page layout used by your mortgage teams, enable Add to users' customized related lists, and save.
3. On the Account Team Setup page, click **Team Roles**.
4. On the Team Role Picklist Edit page, click **New**.
5. Enter *Loan Officer*, *Underwriter*, and other mortgage-related team roles at your company each on their own lines and save.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

6. To move the new roles to the top of the picklist, click **Reorder**, select the new roles, then click **Top**, and save.

SEE ALSO:

[Who Has Access to Account Records?](#)

Update Residential Loan Application Page Layout

Add loan applicant and loan application objects to the related list section of the Residential Loan Application page layout.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter *Residential Loan Application*, then click **Residential Loan Application**.
3. Click **Page Layouts** and then select the Residential Loan Application layout that your mortgage users see.
4. On the palette, select **Related Lists**.
5. Drag the following objects from the palette to the Related Lists section:
 - Loan Applicants
 - Loan Applicant Addresses
 - Loan Applicant Declarations
 - Loan Applicant Employments
 - Loan Applicant Incomes
 - Loan Application Assets
 - Loan Application Financials
 - Loan Application Liabilities
 - Loan Application Properties
 - Loan Application Title Holders
 - Document Checklist Items

6. Click **Save**. If you're prompted to overwrite user's related list customizations, click **Yes**.

After you've updated the Residential Loan Application Page Layout, add the Document Checklist Item component to Account and Opportunity page layouts.

SEE ALSO:

[Update Opportunity and Account Page Layouts](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create and Assign Role

Before a loan officer can create a customer user, they must have a role assigned.

1. Create a loan officer role.



Note: If you already have an appropriate role defined, you can use that role instead of creating a loan officer role.

- a. From Setup, in the Quick Find box, enter *Roles*, and then select **Roles**.
 - b. Click **Set Up Roles**.
 - c. On the Creating the Role Hierarchy page, find the role that the loan officer role reports to and click **Add Role** beneath it.
 - d. Enter a label for the new role, select the appropriate Opportunity Access, and save.
2. Assign a role to loan officers.
 - a. On the Creating the Role Hierarchy page, click **Assign** next to the role you want to assign.
 - b. Under Available Users Search, select **All Unassigned**.
 - c. Select the desired users, click **Add**, and save.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Set Up Action and Recommendations List

Create a list of flows to display to loan officers in the Actions and Recommendations list on residential loan application record detail pages.

1. From Setup, in the Quick Find box, enter *Recommendations*, and select **Actions & Recommendations**.
2. Click **New Deployment** and then click **Next**.
3. Enter a label and an API name for your deployment, select **Flows and quick actions**, and click **Next**.
4. Under Available Objects, enter *Residential Loan Application* and select **Residential Loan Application**.
5. To add Residential Loan Application to the Selected Objects list, click the right arrow and click **Next**.
6. Under All Actions, drag the **Lender Loan Information - Flow** or your customized lender loan flow into the Top Pinned Actions & Recommendations box and click **Next**.
7. Under All Actions, drag the **Borrower Information - Flow** or your customized borrower flow into the Top Pinned Actions & Recommendations box.
8. Under All Actions, drag the **Assets and Liabilities - Flow** or your customized assets and liabilities flow into the Top Pinned Actions & Recommendations box.
9. On the Select actions to add page, click the checkbox to the left of Action Label to deselect all actions.
10. Under Action Label, select Assets and Liabilities, Borrower Information, Lender Loan Information and other actions that you want available from a Residential Loan Application record.



Note: If you have created customized versions of the mortgage flows, select those flows instead of the standard flows.

11. Click **Save** and then click **Go to Lightning App Builder**.
12. On the Lightning App Builder page, click **New**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

13. On the Create a new Lightning page, select **RecordPage**, and click **Next**.
14. Enter *Residential Loan Application Record Page* for label, set Object to Residential Loan Application, and click **Next**.
15. Click **CLONE SALESFORCE DEFAULT PAGE** and then click **Finish**.
16. Drag the Actions & Recommendations component onto the Residential Loan Application Record page into the right column.
17. In the Actions & Recommendations properties window, set Actions & Recommendations Deployment to the deployment you created.
18. Click **Save** and then click **Activate**.
19. On the Activation page, click **Assign as Org Default**, and then click **Save**.

After you've set up your Action and Recommendations List, set up Document Types for Document Checklist Items.

SEE ALSO:

[Set Up Document Types](#)

Define Mortgage Record Creation Settings

Run the Create Financial Records process to generate financial records, such as financial accounts or property assets, from loan application data. Use the Mortgage Record Creation Settings to define which records are created when this process runs.

1. From Setup, in the Quick Find box, enter *Mortgage*, and then select **Mortgage Record Creation Settings**.
2. Review the setting descriptions. Decide which records to generate when the Create Financial Records process runs for a closed loan application.
3. Click **Enable** for each type of record to create.

Setting	Description
Asset Record for New Home	Create an asset record from a loan application property record to represent the new home that was acquired. The new asset record includes the property value, and relates to the primary owner's account.
Liability Record for New Home	Create a liability record from a loan application property record to represent the new mortgage loan. The new liability record includes the mortgage loan amount, and relates to the primary owner's account.
Financial Account Record for New Mortgage	Create a financial account record that represents the mortgage loan. The new financial account record includes the interest rate, terms, and outstanding loan balance.
Financial Account Record for New Home	Create a financial account record from the loan application property to represent the new home. The

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Setting	Description
	new financial account record includes the property value, and relates to the primary owner's account.
Customer Property Record for New Home	Create a customer property record from a loan application property record to represent the new home. The new customer property record includes the property value and address, and relates to the primary owner's account.
Asset Records for Loan Application Assets	Create asset records from the assets listed in the loan application.
Financial Account Records for Loan Application Assets	Create financial account records from the assets listed in the loan application.
Liability Records for Loan Application Liabilities	Create liability records from the liabilities listed in the loan application.
Financial Account Records for Loan Application Liabilities	Create financial account records from the liabilities listed in the loan application.

Set Up Borrower Access to Mortgage Applications in Communities

Create and assign a profile to your customer communities and customize your community home and record detail pages.

[Create a Community User Profile for Borrowers](#)

Create a customer community profile with access to mortgage objects and document checklist items.

[Assign the Borrower Profile to a Community](#)

Assign the borrower profile to your customer community.

[Update Community Pages](#)

Update the Home and Record Detail pages of your community to give borrowers access to mortgage objects, mortgage flows, and document checklist items.

[Mortgage Objects Supported by Out-of-the-Box Components and Pages in Community Templates](#)

Check out the list of mortgage objects supported by out-of-the-box components and pages in Experience Builder templates.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create a Community User Profile for Borrowers

Create a customer community profile with access to mortgage objects and document checklist items.

Ensure that communities are enabled for your organization.

1. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
2. On the Profiles page, click **Clone** next to the Customer Community Login User, the Customer Community Plus Login User, the Customer Community Plus User, or the Customer Community User profile.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

3. On the Clone Profile page, enter *Borrower* for the cloned profile name and save.
4. On the Borrower Profile page, click **Edit**.
5. Under General User Permissions, enable Run Flows.
6. Under Standard Object Permissions, enable read access for Document Checklist Item.
7. Under Standard Object Permissions, enable read, create, edit, and delete access for Loan Applicants, Loan Applicant Addresses, Loan Applicant Assets, Loan Applicant Declarations, Loan Applicant Employments, Loan Applicant Incomes, Loan Applicant Liabilities, Loan Application Assets, Loan Application Financials, Loan Application Liabilities, Loan Application Properties, Loan Application Title Holders, and Residential Loan Applications.
8. Click **Save**.

Assign the Borrower Profile to a Community

Assign the borrower profile to your customer community.

Ensure that communities are enabled and you have at least one customer community created for your organization.

1. From Setup, in the Quick Find box, enter *Communities*, then select **All Communities**.
2. On the All Communities page, click **Workspaces** next to the community you want to assign the borrower profile to.
3. Click the **Administration** tile.
4. Click **Members** in the left pane.
5. Under Select Profiles, select **Customer** in the search drop-down list.
6. Under Available Profiles, select **Borrower**, click **Add**, and then click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Update Community Pages

Update the Home and Record Detail pages of your community to give borrowers access to mortgage objects, mortgage flows, and document checklist items.

Ensure that communities are enabled and you have at least one customer community created for your organization.

[Update Community Home Page](#)

Add the Record List component to the home page to display a list of residential loan applications.

[Update Community Record Detail Page](#)

Add mortgage flows and a list of document checklist items to the Record Detail page in communities.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Update Community Home Page

Add the Record List component to the home page to display a list of residential loan applications. Ensure that communities are enabled and you have at least one customer community created for your organization.

1. From Setup, in the Quick Find box, enter *Communities*, and then select **All Communities**.
2. On the All Communities page, click **Builder** next to the community where you want to update the home page.
3. On the Home page, drag the Record List component onto the page.
4. In the Record List property window, set Object Name to Residential Loan Application.
5. Publish the changes to your community.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Update Community Record Detail Page

Add mortgage flows and a list of document checklist items to the Record Detail page in communities. Ensure that communities are enabled and you have at least one customer community created for your organization.

1. From Setup, in the Quick Find box, enter *Communities*, and then select **All Communities**.
2. On the All Communities page, click **Builder** next to the community where you want to update the record detail page.
3. On the Home page, click the drop-down arrow to the right of Home and select **Record Detail**.
4. Drag the Flow component onto the page.
5. In the Flow property window, set Flow to the name of your borrower flow and enable Pass record ID into this variable.
6. Drag another Flow component onto the page.
7. In the Flow property window, set Flow to the name of your assets and liabilities flow and enable Pass record ID into this variable.
8. Repeat steps 6 and 7 for other mortgage flows that you want your users to fill out.
9. Drag the Record List component onto the page.
10. In the Record List property window, set Object Name to **Document Checklist Item**.
11. Publish the changes to your community.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Mortgage Objects Supported by Out-of-the-Box Components and Pages in Community Templates

Check out the list of mortgage objects supported by out-of-the-box components and pages in Experience Builder templates.

When we talk about supported objects in community templates, we mean that you can use out-of-the-box components on the object pages, as detailed here.



Note: Mortgage objects are not currently usable with partner community components.

API names are indicated in parentheses.

Object Name (API Name)	Components		
	<ul style="list-style-type: none"> • Headline • Record Banner • Record Detail • Record Information Tabs • Related Records 	<ul style="list-style-type: none"> • Navigation Menu • Object Home Page 	<ul style="list-style-type: none"> • Create Record Button • Create Record Form
Loan Applicant (LoanApplicant)	✓	✓	✓
Loan Applicant Address (LoanApplicantAddress)	✓	✓	✓
Loan Applicant Asset (LoanApplicantAsset)			
Loan Applicant Declaration (LoanApplicantDeclaration)	✓	✓	✓
Loan Applicant Employment (LoanApplicantEmployment)	✓	✓	✓
Loan Applicant Income (LoanApplicantIncome)	✓	✓	✓
Loan Applicant Liability (LoanApplicantLiability)			
Loan Application Asset (LoanApplicationAsset)	✓	✓	✓
Loan Application Financial (LoanApplicationFinancial)	✓	✓	✓
Loan Application Liability (LoanApplicationLiability)	✓	✓	✓
Loan Application Property (LoanApplicationProperty)	✓	✓	✓
Loan Application Title Holder (LoanApplicationTitleHolder)	✓	✓	✓
Residential Loan Application (ResidentialLoanApplication)	✓	✓	✓



Note: To be searchable in Experience Cloud sites, objects must be [searchable in Lightning Experience](#) and supported in templates.

SEE ALSO:

[Objects Supported by Out-of-the-Box Components and Pages in Community Templates](#)

Solution Kits for Mortgage

Salesforce solution kits are your go-to when you want to connect your clouds. Cross-cloud solutions help you deliver impactful, personalized experiences that address customer concerns in a digital, cost-effective manner.

Every solution kit gives you:

- A use case overview and the required products.
- A high-level workflow.
- Information about how cloud solutions fit in.
- Solution design considerations.

The kits include a unique use case that addresses a common customer experience conundrum. The use case overview gives you a real-world example of the problematic situation that each kit solves.

For administrators, we provide information to help deploy the functionality, so that you can deliver an experience that reduces the burden on an overwhelmed workforce. Share these kits with anyone experiencing a cross-cloud dilemma.

SEE ALSO:

[Salesforce Help: Loan Forbearance Solution Kit](#)

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.

[Assign the Teller Access Permission Set \(Optional\)](#)

Create a teller user profile and a teller user before assigning the Teller Access permission set.

[Set Object Field Permissions for the Personal Banker Profile](#)

Give your personal banker users appropriate access to Account and Contact fields.

[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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[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.



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, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click **New**.
3. From the Existing Profile list, select **Standard User**.
4. Enter a profile name, such as *Personal Banker*.
5. Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable Personal Banker Profile Permissions

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

1. From **Setup**, in the Quick Find box, enter *Profiles*, and 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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

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**, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click **New**.
3. For **Existing Profile** select *Standard User*.
4. Enter a profile a name, such as *Teller*.
5. Save your changes.
6. From **Setup**, in the Quick Find box, enter *Users*, and then select **Users**.
7. Click the user to be assigned the teller profile.
8. Click **Edit**, and set **Profile** to *Teller*.
9. Save your changes.
10. Under Permission Set Assignments, click **Edit Assignments**.
11. Assign the Financial Services Cloud Basic and Teller Access permission sets.



Note: If tellers perform associate-level or higher tasks, you can assign Financial Services Cloud Standard permissions in place of Financial Services Cloud Basic.

12. Save your changes.

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

Objects	Access
Accounts	Read, Update
Activities, Tasks	Create, Read, Update, Delete
Alerts	Read, Update
Calendar, Events	Create, Read, Update, Delete
Cases	Create, Read

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Objects	Access
Contacts	Read, Update
Content	Create, Read, Update, Delete
Documents	Create, Read, Update, Delete
Employee cases	Create, Read, Update, Delete
Leads	Create, Read, Update



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.

Set Object Field Permissions for the Personal Banker Profile

Give your personal banker users appropriate access to Account and Contact fields.

- From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
- Click the **Personal Banker** profile name.
- Assign the required field-level access for the Account object.
 - Under Standard Field-Level Security in the Field-Level Security section, click **View** next to Account.
 - For each Account field in the Object Field Permissions table, enable the listed Read Access and Edit Access.
- Save your changes.
- Assign the required field-level access for the Contact object.
 - Under Standard Field-Level Security in the Field-Level Security section, click **View** next to Contact.
 - For each Contact field in the Object Field Permissions table, enable the listed Read Access and Edit Access.
- Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Table 11: Object Field Permissions

Object	Field Name	Read Access	Edit Access
Account	External Referrer	✓	✓
Account	Individual Type	✓	
Account	Internal Referrer	✓	✓
Account	Last Transaction Date	✓	
Account	Last Transaction Date - Joint Owner	✓	✓
Account	Last Transaction Date - Primary Owner	✓	✓

Object	Field Name	Read Access	Edit Access
Account	Number of Fin. Accounts - Joint Owner	✓	✓
Account	Number of Fin. Accounts - Primary Owner	✓	✓
Account	Total Number of Financial Accounts	✓	
Account	Total Outstanding Credit	✓	
Account	Total Outstanding Credit - Joint Owner	✓	✓
Account	Total Outstanding Credit - Primary Owner	✓	✓
Account	Total Revenue	✓	✓
Contact	Customer Timezone	✓	✓
Contact	Email Verified	✓	✓
Contact	External Referrer	✓	✓
Contact	Internal Referrer	✓	✓
Contact	Marketing Opt-Out	✓	✓
Contact	Referrer Score	✓	

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create 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.

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**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create 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:

Field Set Label	Name	Where is it used?
Financial Accounts Summary	FSC_Banker_Profile_Fin_Acct_Summary	Personal Banker profile's Financials tab

with these fields:

Label	Name
Total Bank Deposits	TotalBankDeposits
Total Outstanding Credit	TotalOutstandingCredit
Total Number of Financial Accounts	TotalNumberOfFinAccounts

- On Financial Account create the following field sets:

Field Set Label	Name	Where is this used?
Auto Loan Account	FSC_Client_AutoLoan	Client profile's Financials tab
Checking Account	FSC_Client_CheckingAccount	Client profile's Financials tab
Credit Card Account	FSC_Client_CreditCard	Client profile's Financials tab
Savings Account	FSC_Client_SavingsAccount	Client profile's Financials tab
Loan Account	FSC_Client_LoanAccount	Client profile's Financials tab
Mortgage Account	FSC_Client_MortgageAccount	Client profile's Financials tab
HELOC Account	FSC_Client_HELOC	Client profile's Financials tab

with these fields:

Label	Name
Financial Account Name	Name
Type	FinancialAccountType
Owner Type	OwnerType
Date Opened	OpenDate
Balance	Balance

and these field sets:

Field Set Label	Name	Where is this used?
Auto Loan Account	FSC_Group_AutoLoan	Household profile's Financials tab
Checking Account	FSC_Group_CheckingAccount	Household profile's Financials tab
Credit Card Account	FSC_Group_CreditCard	Household profile's Financials tab
Savings Account	FSC_Group_SavingsAccount	Household profile's Financials tab
Loan Account	FSC_Group_LoanAccount	Household profile's Financials tab
Mortgage Account	FSC_Group_MortgageAccount	Household profile's Financials tab
HELOC Account	FSC_Group_HELOC	Household profile's Financials tab

with these fields:

Label	Name
Financial Account Name	Name
Primary Owner	PrimaryOwner
Type	FinancialAccountType
Date Opened	OpenDate
Balance	Balance

- On Lead create the following field set:

Field Set Label	Name	Where is this used?
LBL.Label_Field_Set_Referral_Form	FSC_Referral_Form	Used in global referral form

with these fields:

Label	Name
First Name	FirstName
Last Name	LastName
Expressed Interest	ExpressedInterest
Company	Company
Phone	Phone
Email	Email
Street	Street
City	City
State	State
Postal Code	PostalCode

And:

Field Set Label	Name	Where is this used?
LBL.Label_Field_Set_Referrals_Made	FSC_Referrals_Made_Community	Client profile's Referrals tab

with these fields:

Label	Name
Name	Name
Expressed Interest	ExpressedInterest

Label	Name
Created Date	CreatedDate

And:

Field Set Label	Name	Where is this used?
LBL.Label_Field_Set_Referrals_Made	FSC_Referrals_Made	Client profile's Referrals tab

with these fields:

Related Object	Label	Name
Lead	Name	Name
Lead	Expressed Interest	ExpressedInterest
Lead	Lead Status	Status
Converted Opportunity ID	Opportunity Name	Name

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Object	Record Type	Layout	Profiles
Account	Individual	Account (Retail Client - Individual) Layout	Personal Banker
Billing Statement	Debit	Debit Billing Statement Layout	All
Contact	Individual	Contact (Retail Client - Individual) Layout	Personal Banker
Lead	General	Lead (General) Layout	All
Lead	Retirement Planning	Lead (General) Layout	All
Opportunity	General	Opportunity (General) Layout	All

Object	Record Type	Layout	Profiles
Opportunity	Wallet Share Opportunity	Opportunity (Wallet Share) Layout	Personal Banker

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Lightning Page Name	App	Record Type	Profile
Client Record Page	Wealth Management	Individual	Advisor, System Admin
Client Record Page	Wealth Management	Household	Advisor, System Admin

Lightning Page Name	App	Record Type	Profile
Banking Business Account Page	Retail Banking, Retail Banking Console	Business	Advisor, Personal Banker, System Admin
Banking Business Contact Page	Retail Banking, Retail Banking Console	Business	Advisor, Personal Banker, System Admin
Banking Household Page - One Column	Retail Banking Console	Household	Advisor, Personal Banker, System Admin
Banking Household Page - Two Column	Retail Banking	Household	Advisor, Personal Banker, System Admin
Banking Individual Page - One Column	Retail Banking Console	Individual	Advisor, Personal Banker, System Admin
Banking Individual Page - Two Column	Retail Banking	Individual	Advisor, Personal Banker, System Admin

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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

Enable Wealth Management Features

Give your financial advisors a holistic view of customers with Wealth Management, a Financial Services Cloud Lightning app. Empower your advisors 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.

Follow these steps to enable Wealth Management features.

[Create a Financial Advisor Profile](#)

Create a Financial Advisor profile to define the permissions and field-level security settings for all wealth managers.

[Enable Financial Advisor Profile Permissions](#)

Enable the permissions and field-level security setting for the Financial Advisor profile.

[Add Quick Actions in Client Segmentation App](#)

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

[Embed Client Segmentation App Dashboards in Financial Services Cloud](#)

After you create and share the Client Segmentation App 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.

[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.

[Specify Custom Record Types for Synchronization](#)

Specify custom record types to synchronize next and last interactions on Account.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create a Financial Advisor Profile

Create a Financial Advisor profile to define the permissions and field-level security settings for all wealth managers.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click **New**.
3. From the Existing Profile list, select **Standard User**.
4. Enter a profile name, such as *Financial Advisor*.
5. Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable Financial Advisor Profile Permissions

Enable the permissions and field-level security setting for the Financial Advisor profile.

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

2. Click **Edit** next to Financial Advisor.

If the Enhanced Profile User Interface setting is enabled in your org, click **Financial Advisor** to open it. Then, click individual settings to open and edit them.

3. Make these changes:

- Under Custom App Settings:
 - Set Wealth Management as the default app.

- Under Tab Settings -> Custom Tab Settings:



Note: You can change the default tab settings according to your requirements.

- 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

4. Save your changes.

5. Under Field-Level Security, click **View** next to Task.

6. Click **Edit** and select the Read Access checkbox for the Type field.

7. Save your changes, and then click **Back to Profile**.

8. Under Record Type Settings, verify the following:

- The Contacts record type defaults to Individuals.
- The Events record type includes Advisor Event and defaults to Advisor Event.
- The Leads record type includes Referral and defaults to Referral.
- The Billing Statements record type includes Credit and Debit and defaults to Credit.
- The Financial Accounts record type includes Auto Loan, Checking Account, Credit Card, HELOC, Loan Account, Mortgage, Savings Account, and General Account, and defaults to Checking Account.
- The Opportunities record type defaults to General.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- The Tasks record type includes Advisor Task and defaults to Advisor Task.

Add Quick Actions in Client Segmentation App

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

Client Details


#	Client Name	Category	Risk Tolerance	Marketing Segment
4	Gregory Hunt	Silver	Aggressive	Mass Affluent
5	Gregory Owens			Worth
6	Linda Bailey			Investor
7	Bob Stanley			al
8	Aaron Thompson			luent
9	Anthony Wallace			Worth
10	John Putnam			al
11	Anne Tucker	Silver	None	Femal Investor

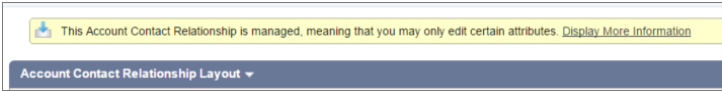
EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 **Quick Actions**, 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 App Dashboards in Financial Services Cloud

After you create and share the Client Segmentation App 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 a Tableau CRM Dashboard to a Visualforce Page](#)
- [Create Visualforce Tabs](#)

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** in the Quick Find box, enter *apex*, and 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 is scheduled to run every 15 minutes.
8. Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Specify Custom Record Types for Synchronization

Specify custom record types to synchronize next and last interactions on Account.

1. From **Setup** in the Quick Find box, enter *Custom Metadata Types*, 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

COMMON CAPABILITIES IN FINANCIAL SERVICES CLOUD

Set up and manage Financial Services Cloud features that aren't specific to a line of business.

Set up the common capabilities that are useful for your org.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Work with Groups \(Householding\) in Financial Services Cloud](#)

Groups (Householding) gives you the flexibility to organize your customers in ways that are meaningful to you.

[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.

[Drive Contextual Action for Your Customer Relationships and Hierarchies](#)

Actionable Relationship Center (ARC) lets you visualize your customers relationships in new ways. Use ARC to see both Financial Services Cloud relationships and related list relationships in one view.

[Branch Management](#)

Track branch performance and productivity with Branch Management. The Branch Management data model, console app, and branch association engine (beta) let branch managers and administrators track the work output of branches, employees, and customer segments in Financial Services Cloud. Branch Management works seamlessly with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

[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.

[Compliant Data Sharing in Financial Services Cloud](#)

The Compliant Data Sharing feature lets administrators and compliance managers configure advanced data sharing rules, so that they can improve compliance with regulations and company policies. They can control and monitor what data gets shared with whom, without writing complex code.

[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.

[Track and Manage a Financial Deal Lifecycle](#)

Help deal teams effectively track a financial deal lifecycle with the new Financial Deal Management data model. They can manage every aspect of deal-related interactions and take advantage of compliant, role-based data sharing options. They can create new financial deal records to specify the deal stage, the status of the deal, the probability of the deal being successfully closed, and more. They can share deal records that contain confidential information only with relevant stakeholders to maintain compliance.

Document Tracking and Approvals

A document type defines commonly required documentation for completing a business process. Create a document checklist item for each file required from a customer. A customer or user then uploads a relevant file for the document checklist item, and the files are tracked through an approval process. Customers upload new versions of rejected documents and track the progress of their uploaded documentation from submission to approval.

Life Events and Business Milestones

With the Life Events or Business Milestones component, get an at-a-glance view of your customers' life events or business milestones. Use the details to identify upcoming opportunities and devise timely personalized offers and engagement. The Life Events or Business Milestones component shows life events for a person account or contact record and business milestones for an account record.

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.

Rollups in Financial Services Cloud

Financial Services Cloud supports client- and group-level record rollups and rollup by lookup (RBL) rules. .

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.

Individual Model Setup in Financial Services Cloud

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

Work with Groups (Householding) in Financial Services Cloud

Groups (Householding) gives you the flexibility to organize your customers in ways that are meaningful to you.

A group can give insight into a customer's financial circles, such as a household with its family members and professional connections. But a group can also give you a view of your customers in other contexts. For instance, you can

- group customers according to the services that you need to provide them
- group your top ten customers
- group customers buying a house
- group customers with more than 20 million in AUM

Set Up Relationship Groups

Set up relationship groups to let advisors add individuals to more than one group, add businesses to groups, and visualize relationships.

Create Expanded Account Relationships in Group Builder

Create business and personal account relationship hierarchies using the enhanced Account Account Relationship entity. Directly associate businesses and legal entities, such as trusts, to households and groups. It's easy to view a parent company and its subsidiaries, as well as family relationships, in the enhanced Relationship Map.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Customize Roles for Person Accounts and Individuals](#)

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

[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.

Set Up Relationship Groups

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.

[Components That Visualize Groups and Relationships](#)

Financial Services Cloud offers several components to visualize groups and relationships in Lightning pages.

Enable Multiple Relationship Groups

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



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

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.


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

Components That Visualize Groups and Relationships

Financial Services Cloud offers several components to visualize groups and relationships in Lightning pages.

Table 12: Financial Services Components That Visualize Groups and Relationships

Component	Description	Type
ARC - Financial Services Cloud	Renders the Actionable Relationship Center hierarchy for an account or contact. Use at person and group levels.	Standard
Group Members (Configurable) - Financial Services Cloud	Displays relationship group members, associated information, and task subtypes in a compact grid. To customize the member details displayed, use a custom Account field set. Use at person and group levels.	Custom

Component	Description	Type
Group Members - Financial Services Cloud	Displays relationship group members and age, phone, mobile, email, next and last interaction dates, and task subtypes in a list. Use at person and group levels.	Custom
Related Account - Financial Services Cloud	Displays 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.	Custom
Related Contact - Financial Services Cloud	Displays Account Contact Relationships for a person or group.  Note: This component doesn't display standard contacts that look up to accounts. The standard Contacts related list displays contacts that look up to accounts.	Custom
Relationship Group List - Financial Services Cloud	Displays a person's groups and group members as a related list. Use at the person level. Create and customize the WM_Client_Relationship_Groups Account field set to control what fields the top section of the component displays. Create and customize the WM_Client_Relationship_Group_Members Contact field set to control what fields the first subsection of the component displays. Create and customize the WM_Client_Relationship_Group_Members Account field set to control what fields the second subsection of the component displays.	Custom
Relationship Map - Financial Services Cloud	Displays a visual model of relationships for accounts, contacts, and individuals. Use at person and group levels.	Custom

[Control Who Sees What on the Relationship Map and in 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.

[Customize Field Sets for the Relationship Group List Component](#)

Customize field sets to affect the relationship group and group member information displayed in Relationship Group List - Financial Services Cloud component. This component is used on an individual or person account profile's Relationships tab.

[Set Up Group Member \(Configurable\) Component](#)

The Group Member (Configurable) component displays relationship group members, associated information, and task subtypes in a compact grid. Customize the group member details to display by creating a field set and associating it with the component.

SEE ALSO:

[Set Up Group Member \(Configurable\) Component](#)

[Drive Contextual Action for Your Customer Relationships and Hierarchies](#)

[Customize the Relationship Group List Component's Group Detail](#)

Control Who Sees What on the Relationship Map and in Group Builder

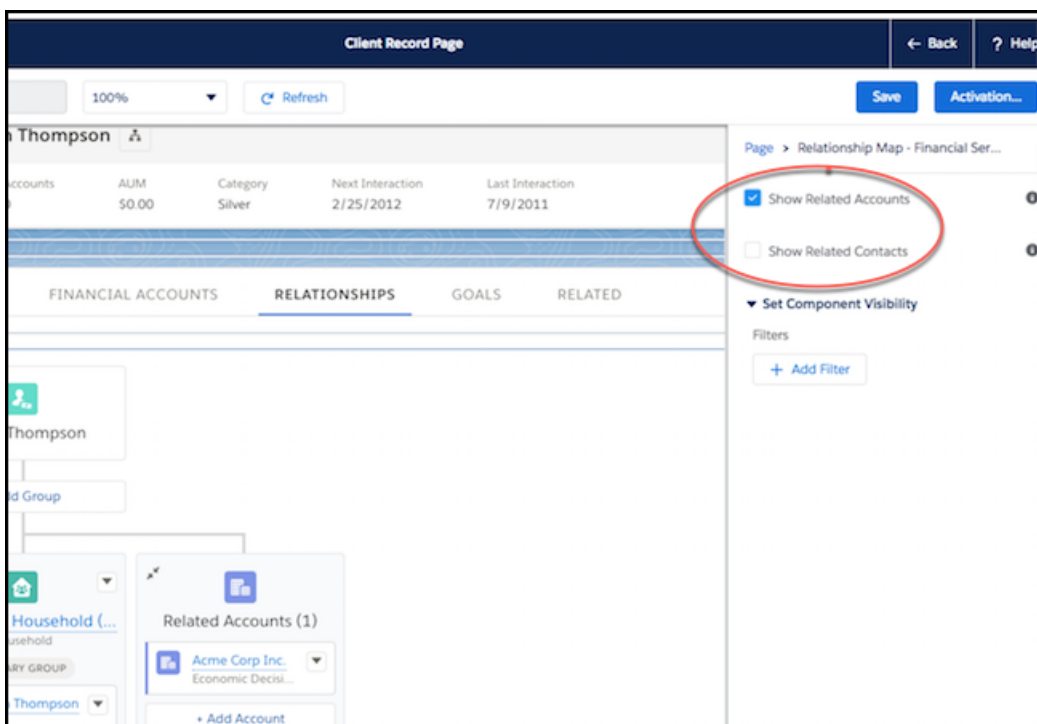
Provide the right level of detail on the Relationship Map and Group Builder based on users' roles, such as advisor, banker, or teller. Edit Lightning pages to show or hide Related Accounts and Related Contacts.

1. From Setup, in the Quick Find box, enter *App Builder*, 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 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



5. Save your changes.

- 6. Optional: If you created a page, activate the page to allow your assigned users to see it.

SEE ALSO:

[Salesforce Help: Activate Lightning Experience Record Pages](#)

Customize Field Sets for the Relationship Group List Component

Customize field sets to affect the relationship group and group member information displayed in Relationship Group List - Financial Services Cloud component. This component is used on an individual or person account profile’s Relationships tab.

The Relationship Group List - Financial Services Cloud component is a custom Lightning App Builder component. For person accounts, add this component to the Relationships tab on person account page layout. For individuals, add this component to the Relationships tab on the individual page layout.

Relationship Groups (1)				New
ACCOUNT NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS	
Adams Household (Sample)	Household	Dec 12, 2020	\$1,778,911.21	
FULL NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS	
Rachel Adams (Sample)		Dec 12, 2020	\$1,203,911.21	
Nigel Adams (Sample)			\$312,377.65	
ACCOUNT NAME	RECORD TYPE NAME	CATEGORY	TOTAL FINANCIAL ACCOUNTS	
Adams Charitable Trust (Sample)	Institution		\$282,100.00	

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Customize the Relationship Group List Component’s Group Detail

Create or edit the WM_Client_Relationship_Groups field set to customize the top table of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile’s Relationships tab.

Customize the Relationship Group List Component’s Account Details

Create or edit the WM_Client_Relationship_Group_Members Account field set to customize the second subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile’s Relationships tab.

Customize the Relationship Group List Component’s Contact Details

Create or edit the WM_Client_Relationship_Group_Members Contact field set to customize the first subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile’s Relationships ta Pub /templateb.

Customize the Relationship Group List Component’s Group Detail

Create or edit the WM_Client_Relationship_Groups field set to customize the top table of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile’s Relationships tab.

The top part of the Relationship Group List - Financial Services Cloud component displays a table of account information for groups related to a person account or an individual.


Relationship Groups (1)				New
ACCOUNT NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS	
Adams Household (Sample)	Household	Dec 12, 2020	\$1,778,911.21	

EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

Create or edit the *WM_Client_Relationship_Groups* field set on the Account object to customize the columns displayed for each relationship group.

 **Note:** The *WM_Client_Relationship_Groups* field set is created by default for new orgs.

1. From Setup, open **Object Manager**.
2. Click **Account**, and then select **Field Sets**.
3. To create the field set:
 - a. Click **New**.
 - b. Enter the **Field Set Label** *Relationship Groups*.
 - c. Enter the **Field Set Name** *WM_Client_Relationship_Groups*.
 - d. For **Where is this used?**, enter *Client profile's Relationships tab*.
 - e. Save your changes.
 - f. Skip to step 5.
4. To edit the field set:
 - a. In the Quick Find box, enter the API name of the field set to edit.
 - b. Click the field label for the field set to edit.
5. Drag the fields that you want to display from the object palette to the **In the Field Set** container.
 - a. Drag the **Account Name**, **Last Interaction** and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

 **Note:** **Account** is selected by default in the object palette.
 - b. Select **Record Type Id** in the object palette. Then drag the **Name** field from the object palette to the **In the Field Set** container.
 - c. Add any additional fields you want to display for each group in the Relationship Group List - Financial Services Cloud custom component.
6. To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.
7. Click **Save** on the object palette.

Customize the Relationship Group List Component's Account Details

Create or edit the *WM_Client_Relationship_Group_Members* Account field set to customize the second subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile's Relationships tab.

The Relationship Group List - Financial Services Cloud component displays a table of account information for group members of a relationship group. The second subsection displays account information for relationship group members.

EDITIONS

Financial Services Cloud is available in Lightning Experience.


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

Relationship Groups (1)				New
ACCOUNT NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS	
✓ Adams Household (Sample)	Household	Dec 12, 2020	\$1,778,911.21	
FULL NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS	
Rachel Adams (Sample)		Dec 12, 2020	\$1,203,911.21	
Michael Adams (Sample)			\$515,277.66	
ACCOUNT NAME	RECORD TYPE NAME	CATEGORY	TOTAL FINANCIAL ACCOUNTS	
Adams Charitable Trust (Sample)	Institution		\$282,100.00	

Create or edit the WM_Client_Relationship_Group_Members field set on the Account object to customize the columns displayed for each relationship group.

 **Note:** The WM_Client_Relationship_Group_Members Account field set is created by default for new orgs.

- From Setup, open **Object Manager**.
- Click **Account**, and then select **Field Sets**.
- To create the field set:
 - Click **New**.
 - Enter the **Field Set Label** *Relationship Group Members*.
 - Enter the **Field Set Name** *WM_Client_Relationship_Group_Members*.
 - For **Where is this used?**, enter *Client profile's Relationship Group's table*.
 - Save your changes.
 - Skip to step 5.
- To edit the field set:
 - In the Quick Find box, enter the API name of the field set to edit.
 - Click the field label for the field set to edit.
- Drag the fields that you want to display from the object palette to the **In the Field Set** container.
 - Drag the **Account Name**, **Category**, and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

 **Note:** **Account** is selected by default in the object palette.

 - Select **Record Type Id** in the object palette.
 - Drag the **Name** field from the object palette to the **In the Field Set** container.
 - Click **Save** on the object palette.
 - Add any additional fields that you want to display for Account group members in the Relationship Group List component.
- To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.
- Click **Save** on the object palette.

Customize the Relationship Group List Component's Contact Details

Create or edit the WM_Client_Relationship_Group_Members Contact field set to customize the first subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile's Relationships tab at Pub /templateb.

The Relationship Group List - Financial Services Cloud component displays a table of account information for members of a relationship group. The first subsection displays contact information for relationship group members.

ACCOUNT NAME	RECORD TYPE NAME	LAST INTERACTION	TOTAL FINANCIAL ACCOUNTS
Adams Household (Sample)	Household	Dec 12, 2020	\$1,778,911.21
Rachel Adams (Sample)		Dec 12, 2020	\$1,203,911.21
Nigel Adams (Sample)			\$312,377.05

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create or edit the WM_Client_Relationship_Group_Members field set on the Contact object to customize the columns displayed for each relationship group.

Note: The WM_Client_Relationship_Group_Members Contact field set is created by default for new orgs.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, type *contact*, and then click **Contact**.
3. Select **Field Sets**, and then click **New**.
4. To create the field set:
 - a. Click **New**.
 - b. Enter the **Field Set Label** *Relationship Group Members*.
 - c. Enter the **Field Set Name** *WM_Client_Relationship_Group_Members*.
 - d. For **Where is this used?**, enter *Client profile's Relationship Group's table*.
 - e. Save your changes.
 - f. Skip to step 6.
5. To edit the field set:
 - a. In the Quick Find box, enter *WM_Client_Relationship_Group_Members*.
 - b. Click the field label for Relationship Group Members.
6. Drag the fields that you want to display from the object palette to the **In the Field Set** container.
 - a. Drag the **Name** field from the object palette to the **In the Field Set** container.

Note: **Contact** is selected by default in the object palette.
 - b. Select **Record Type Id** in the object palette.
 - c. Drag the **Name** field from the object palette to the **In the Field Set** container.
 - d. Select **Account Id** in the object palette.
 - e. Drag the **Last Interaction** and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

- f. Add any additional fields that you want to display for Contact group members in the Relationship Group List component.
7. To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.
8. Click **Save** on the object palette.

Set Up Group Member (Configurable) Component

The Group Member (Configurable) component displays relationship group members, associated information, and task subtypes in a compact grid. Customize the group member details to display by creating a field set and associating it with the component.

Create a Field Set for Group Member (Configurable) Component


Create a custom field set that includes information about group members to display in the Group Member (Configurable) component on the Relationships tab of an individual's profile.

Customize the Group Members (Configurable) Component

To show member data that is configured for your business, replace the Group Members Lightning component on a custom client record page with the Group Members (Configurable) component. Customize the fields to display by associating a custom field set with the component. Also configure whether group activities rollups are displayed on the component.

Create a Field Set for Group Member (Configurable) Component

Create a custom field set that includes information about group members to display in the Group Member (Configurable) component on the Relationships tab of an individual's profile.

1. From Setup, open **Object Manager**.
2. Click **Account**, and then select **Field Sets**.
3. Click **New**.
4. Enter a **Field Set Label** for your custom field set. For example, enter *Group Member Details*.
5. Enter a **Field Set Name**. For example, enter *WM_Client_Groups_Member_Details*.
6. In **Where is this used?**, enter *Client profile's Relationships tab* if you plan to use this field set with the Group Members (Configurable) component.
7. Save your changes.
8. Drag the fields that you want to display on each group member card from the object palette to the **In the Field Set** container.
 - a. For example, drag the **Account**, **Category**, and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.
-  **Note:** **Account** is selected by default in the object palette.
 - b. To add fields from objects other than Account, click the name of the object in the object palette, and then drag the desired fields to the **In the Field Set** container. For example, select **Record Type Id** in the object palette. Then drag the **Name** field from the object palette to the **In the Field Set** container.
9. Click **Save** on the object palette.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

In Lightning App Builder, set the Field Set for Group Members attribute for the Group Members (Configurable) component to the Field Set Name.

SEE ALSO:

[Customize the Group Members \(Configurable\) Component](#)

Customize the Group Members (Configurable) Component

To show member data that is configured for your business, replace the Group Members Lightning component on a custom client record page with the Group Members (Configurable) component. Customize the fields to display by associating a custom field set with the component. Also configure whether group activities rollups are displayed on the component.

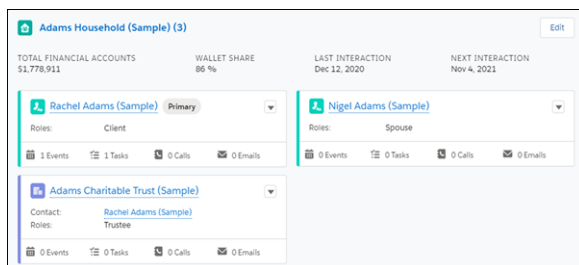
The Group Members (Configurable) component in Lightning App Builder allows you to customize the fields to display to your users and whether group activity rollups are displayed.

1. From Setup, in the Quick Find box, enter *App Builder*, and 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.

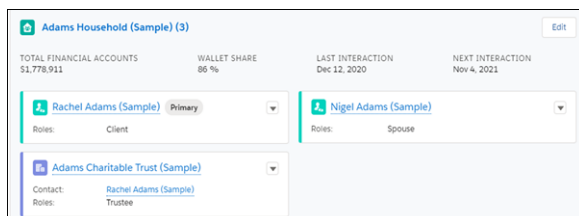
EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



6. Enter the field set name in the Group Members (Configurable) component's Field Set textbox. For example, enter *WM_Client_Group_Member_Details*.
7. (Optional) Deselect **Show group activity roll-ups** to hide group activity rollups on each card.



8. Select the existing **Group Members** component and delete it.
9. Save your changes.

10. To exit Lightning App Builder, click **Back** and then refresh your browser.

SEE ALSO:

[Create a Field Set for Group Member \(Configurable\) Component](#)

[Salesforce Help: Lightning App Builder](#)

Create Expanded Account Relationships in Group Builder

Create business and personal account relationship hierarchies using the enhanced Account Account Relationship entity. Directly associate businesses and legal entities, such as trusts, to households and groups. It's easy to view a parent company and its subsidiaries, as well as family relationships, in the enhanced Relationship Map.

[Enable the Custom Metadata Types for Expanded Account-Account Relationships](#)

Use the Enable Relationship Group Hierarchy custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation.

[Set Up Association Types](#)

Control how account account relationship records are displayed in the Relationship Map and the Actionable Relationship Center components using the Association Type picklist.

[Enable Field-Level Security for the Association Type Field](#)

Update field-level security for user profiles to give them access to the Relationship Map enhancements.

[Add the Association Type Field to Page Layouts](#)

Display a list of values that shows the relationship of accounts in the Relationship Map with the Association Type field. Picklist values are group (parent account), member (child account), and peer (lateral relationship). The default value is group.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable the Custom Metadata Types for Expanded Account-Account Relationships

Use the Enable Relationship Group Hierarchy custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation.

1. From Setup, in the Quick Find box, enter *Custom Metadata*, and then select **Custom Metadata Types**.
2. Select **Manage Records** for Feature Flag Settings.
3. Select **Edit** for the **Enable Relationship Group Hierarchy** custom metadata type.
4. Select Active and then save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Set Up Association Types

Control how account relationship records are displayed in the Relationship Map and the Actionable Relationship Center components using the Association Type picklist.

The Association Type field on the Account Account Relationship object specifies types of relationships between two accounts. For example, if your customers work with subcontractors and you want to capture those AARs, add *Subcontractor* as a Association Type picklist value.



Warning: The values with the API Names **Group**, **Member**, and **Peer** must always be activated in the Association Type picklist. You can change display values for these entries but not API Names. If these three entries are not activated, Relationship Map, Group Builder, and Actionable Relationship Center will not work as expected.

1. From Setup, select **Object Manager**.
2. Click the **Account-Account Relationship** object.
3. Click **Fields & Relationships** in the left-hand menu.
4. Click **Association Type**.
5. In the Values section, verify that the three required entries with the API Names **Group**, **Member**, and **Peer** are listed.

Values					
New Reorder Replace Printable View Chart Colors Values Help					
Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Group	Group	<input type="checkbox"/>	Assigned dynamically	Financial Services Cloud, 4/8/2020, 1:20 PM
Edit Del Deactivate	Member	Member	<input type="checkbox"/>	Assigned dynamically	Financial Services Cloud, 4/8/2020, 1:20 PM
Edit Del Deactivate	Peer	Peer	<input checked="" type="checkbox"/>	Assigned dynamically	Financial Services Cloud, 4/8/2020, 1:20 PM



Note: If any of the required entries appear in the **Inactive Values** list, click **Activate** to move each one back to the **Values** list.

6. (Optional) Create other descriptive Association Type values as needed.
 - a. In the **Values** section, click **New**.
 - b. Enter one or more new picklist values into the text area, then click **Save**.

Enable Field-Level Security for the Association Type Field

Update field-level security for user profiles to give them access to the Relationship Map enhancements.

1. From Setup, select **Object Manager**.
2. Select **Account-Account Relationship**.
3. Select **Fields & Relationships**, then select **Association Type**.
4. Select **Set Field-Level Security**.
5. Select **Visible** for all applicable user profiles, such as System Administrator, Advisor, Personal Banker, and Relationship Manager.
6. Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Add the Association Type Field to Page Layouts

Display a list of values that shows the relationship of accounts in the Relationship Map with the Association Type field. Picklist values are group (parent account), member (child account), and peer (lateral relationship). The default value is group.

1. From Setup, select Object Manager.
2. Select **Account-Account Relationship**.
3. Select **Page Layouts**, then select **Account-Account Relationship Layout**.
4. From the palette, drag the Association Type field onto the page layout.
5. Save your changes.



Note: Repeat these steps for all page layouts assigned to your user profiles.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Customize Roles for Person Accounts and Individuals

Customize the roles that person accounts and 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.

EDITIONS

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

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. From the App Launcher, find and open the Reciprocal Roles tab.
2. From the list view dropdown menu, select **All** to view the reciprocal roles. The roles provided are:

Role	Inverse Role
Accountant	Client
Business	Proprietor
Business	Client
Client	Accountant
Client	Lawyer
Client	Power of Attorney
Client	Business

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Role	Inverse Role
Dependent	Parent
Ex-Spouse	Ex-Spouse
Extended Family	Extended Family
Grandchild	Grandparent
Grandparent	Grandchild
Lawyer	Client
Parent	Dependent
Parent Company	Subsidiary
Power of Attorney	Client
Proprietor	Business
Sibling	Sibling
Spouse	Spouse
Subsidiary	Parent Company

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?](#)

[Salesforce Help: Configure Reciprocal Roles](#)

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.

[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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[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 use them.

SEE ALSO:

[Salesforce Help: Create Record Types](#)

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. Assign the new record types to the Advisor and Personal Banker profiles.

When advisors and personal bankers create a group, this custom record type is available to use.

SEE ALSO:

[What Is a Group?](#)

[Salesforce Security Guide: Assign Record Types and Page Layouts in the Enhanced Profile User Interface](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 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 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.
11. Assign the new record types to the Advisor and Personal Banker profiles.
When advisors and personal bankers create an account or contact, this custom record type is available to use.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

SEE ALSO:

[What Is a Relationship?](#)

[Salesforce Security Guide: Assign Record Types and Page Layouts in the Enhanced Profile User Interface](#)

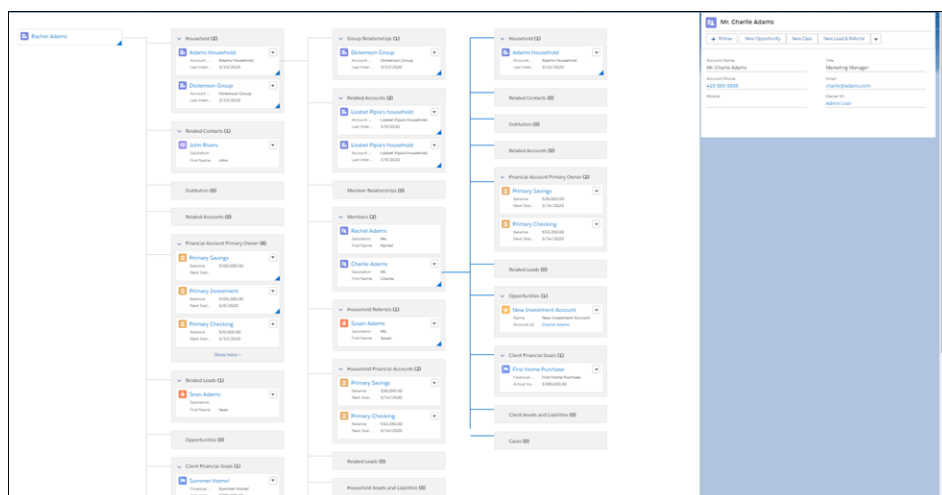
Drive Contextual Action for Your Customer Relationships and Hierarchies

Actionable Relationship Center (ARC) lets you visualize your customers relationships in new ways. Use ARC to see both Financial Services Cloud relationships and related list relationships in one view.

Use ARC with the Financial Services Cloud Relationship Map. Manage and create relationships with Relationship Map. Explore deeper levels of connection and quickly take specific actions all in one context with ARC.



Note: ARC is supported for orgs that have implemented the person account model. We don't provide ARC support for orgs that use the Individual model.



Set Up Actionable Relationship Center

Update your Account and Contact page layouts and assign users the appropriate permissions.

Explore Relationship Groups with ARC

Actionable Relationship Center (ARC) displays different kinds of account and contact relationships in one convenient interface.

View and Manage Related Lists with ARC

Help users manage related records in Actionable Relationship Center (ARC) by configuring the related lists that they see.

Create and Edit Account Relationships with ARC

The Actionable Relationship Center (ARC) interface lets you create, edit, and remove account-account and account-contact relationships.

Considerations and Limitations for Actionable Relationship Center

Here are some things to keep in mind when you implement Actionable Relationship Center (ARC).



SEE ALSO:

[How Is a Person Modeled?](#)

[Create Expanded Account Relationships in Group Builder](#)

Set Up Actionable Relationship Center

Update your Account and Contact page layouts and assign users the appropriate permissions.

-  **Note:** ARC is supported for orgs that have implemented the person account model. We don't provide ARC support for orgs that use the Individual model.
-  **Note:** ARC requires that the Association Type field of the Account-Account Relationship object has active picklist values with the following API Names: Group, Member, and Peer.

Add Actionable Relationship Center to Page Layouts

Add the component for Actionable Relationship Center to page layouts where your users need it.

[Create Actionable Relationship Center Permission Set](#)

To allow users the ability to view Actionable Relationship Center (ARC), create an ARC permission set.

[Assign Permissions to Actionable Relationship Center Users](#)

To allow users the ability to view Actionable Relationship Center (ARC), assign them appropriate permissions.

SEE ALSO:

[Set Up Association Types](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

Add Actionable Relationship Center to Page Layouts

Add the component for Actionable Relationship Center to page layouts where your users need it.

You can only add the component for Actionable Relationship Center to page layouts for Account or Contact objects.

1. From the Setup menu on a record page, select **Edit Page**.
2. In Lightning App Builder, drag **ARC - Financial Services Cloud** onto your page.
3. (Optional) In the ARC - Financial Services Cloud properties pane, enter a label like ARC.
4. (Optional) To display Compliant Data Sharing participants for selected records in the detail panel, select **Show participants**.



Note: To show participants for selected records, you must have Compliant Data Sharing enabled for your org.

5. (Optional) Add filters to limit users' ability to view the component.
 - a. Click **Add Filter**.
 - b. Select **Advanced**
 - c. To filter who can see the component, click **Select**.
 - d. Select a field type of **Device**, **User**, **Permissions**, or **Record** from the dropdown list.
 - e. Select a field from the dropdown list.
 - f. Click **Done**.
 - g. Select an operator for the filter.
 - h. Enter the value or values to use for the filter.
 - i. Click **Done**.

6. Save your changes.



Note: If your page is already activated, clicking **Save** makes your changes available to your users.

SEE ALSO:

[Salesforce Help: Dynamic Lightning Pages](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create Actionable Relationship Center Permission Set

To allow users the ability to view Actionable Relationship Center (ARC), create an ARC permission set.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
2. On the Permission Sets Setup page, click **New**.
3. Enter a name for the permission set like *ARC*.
4. Enter an API Name for the permission set or use the system default.
5. Enter a description for the permission set.
6. Set License to **None**, and then click **Save**.
7. On the ARC Permission Set page, under System, click **System Permissions**, and then click **Edit**.
8. Under System, enable Access ARC – Financial Services Cloud Component.
9. Click **Save**.

Assign the permission set to users.

Assign Permissions to Actionable Relationship Center Users

To allow users the ability to view Actionable Relationship Center (ARC), assign them appropriate permissions.

Create the permission set for ARC before attempting to assign it to users, and ensure that users have already been assigned the required permission set license.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
2. On the Permission Sets Setup page, click name of the permission set to assign. For instance, if you created an ARC permission set, click **ARC**.
3. Click **Manage Assignments**, and then click **Add Assignments**.
4. To assign the permission set, select users and then click **Assign**.

 **Note:** You can only assign a permission set to active users.

SEE ALSO:

[Financial Services Cloud Permission Set Licenses](#)

[Create Actionable Relationship Center Permission Set](#)

[Salesforce Help: Licenses Overview](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Explore Relationship Groups with ARC

Actionable Relationship Center (ARC) displays different kinds of account and contact relationships in one convenient interface.

Relationships can be complicated. ARC helps users understand relationships among people and businesses by presenting them in a convenient and interactive display component. ARC displays the following types of account relationships and other related records:

1. Account-account relationships. Relationships between accounts are categorized by the predefined Association Types:
 - **Group:** indicates that a first Account is a group that contains other accounts. For example, a parent company account can have a Group relationship with one or more subsidiary accounts.
 - **Member:** Indicates that the first account belongs to the second account in some way. For example, a person account can have a Member relationship to a household account.
 - **Peer:** Indicates that the first and second accounts are related, but don't contain or control each other. For example, a business account can have a Peer relationship to another business that is an important supplier.
2. Account-contact relationships. For example, a business can have an account-contact relationship with a person account that is its employee. ARC shows account-contact relationships that relate to person account record types, and but not to individual record types.
3. Related lists of other records. The lists that are shown differ based on the type of record that is selected in the ARC interface.

The following tables describe the relationship cards displayed in ARC for each type of selected record.

Table 13: Relationship Cards for Households

Card	Relationship (Association Type)	Description
Group Relationships	Account-account relationship (Group)	Lists accounts that are contained within a parent account, such as subsidiaries controlled by a parent company.
Related Accounts	Account-account relationship (Peer)	Lists accounts that have non-hierarchical associations to the selected account, such as a supplier companies.
Member Relationships	Account-account relationship (Member)	Lists accounts that are currently tied to a parent account, such as a trust that holds assets for the household.
Members	Account-contact relationship, where the contact is a Person Account record	Lists person accounts that fulfill a specified role for the selected account.

Table 14: Relationship Cards for Business Accounts

Card	Relationship (Association Type)	Description
Group Relationships	Account-account relationship (Group)	Lists accounts that are contained within a parent account, such as subsidiaries controlled by a parent company.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Card	Relationship (Association Type)	Description
Related Contacts	Account-contact relationship, where the contact is a Person Account record	Lists person accounts that fulfill a specified role for the selected account.  Note: This card doesn't display standard contacts that look up to accounts. To view contacts that look up to accounts in ARC, add the Contacts related list to the page layout that you use to display Account (Business) objects.
Related Accounts	Account-account relationship (Peer)	Lists accounts that have non-hierarchical associations to the selected account, such as supplier companies.
Member Relationships	Account-account relationship (Member)	Lists accounts that are currently tied to a parent account, such as person accounts that are employees of the business.

Table 15: Relationship Cards for Person Accounts

Card	Relationship (Association Type)	Description
Households	Account-contact relationship (Group)	Lists household accounts that are related to the selected person account, such as households that the person belongs to.
(Other Group-Enabled Record Types)	Account-contact relationship (Group)	Displays an extra card for each group-enabled account record type (in addition to Household) that the person belongs to.
Related Contacts	Contact-contact relationship	Lists other contacts that fulfill a specified role for the selected person account.
Related Accounts	Account-contact relationship (Member)	Lists other accounts associated with the person account, such as a business account that is the person's employer.

SEE ALSO:

[What Is a Group?](#)[What Is a Relationship?](#)[Set Up Association Types](#)[View and Manage Related Lists with ARC](#)[Configure Custom Record Types for Groups](#)

View and Manage Related Lists with ARC

Help users manage related records in Actionable Relationship Center (ARC) by configuring the related lists that they see.

ARC displays up to 10 related lists that have a configured compact layout. The related lists appear after the Financial Services Cloud junction objects in a collapsed state by default.

Edit the page layout for an object to control which related lists are visible in ARC. ARC displays related lists in the same order they're shown in the page layout defined for the associated object. The following table describes the related lists shown for each object by default.

Table 16: ARC Related Lists Displayed by Default

Object	Allowed Related Lists
Account (Person, Group, and Business combined)	<ul style="list-style-type: none"> Household Financial Accounts Household Financial Goals Household Opportunities Household Referrals Financial Account Primary Owner Client Financial Goals Household Assets and Liabilities Client Assets and Liabilities Related Leads Opportunities Cases
Contact	<ul style="list-style-type: none"> Opportunities Cases Related Accounts (Shows Account Contact Relationship with fields) Notes and Attachments
Lead and Referral	<ul style="list-style-type: none"> Notes and Attachments HTML Email Status
Opportunity	<ul style="list-style-type: none"> Products (OpportunityLineItem) Notes and Attachments Partners Residential Loan Applications Insurance Policies
Financial Account	<ul style="list-style-type: none"> Opportunities Financial Holdings Financial Account Transactions

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Object	Allowed Related Lists
	<ul style="list-style-type: none"> Approval History Cases
Financial Goal	Approval History
Product	<ul style="list-style-type: none"> Financial Account products Price Books Assets Cases
Case	<ul style="list-style-type: none"> Case History Work Orders Team Members
Work Order	<ul style="list-style-type: none"> Work Order Line Items Service Appointments Articles Child Work Orders Expenses
Asset and Liability	<ul style="list-style-type: none"> Assets and Liabilities History Approval History Notes and Attachments
Financial Holding	<ul style="list-style-type: none"> Approval History Notes and Attachments

Create and Edit Account Relationships with ARC

The Actionable Relationship Center (ARC) interface lets you create, edit, and remove account-account and account-contact relationships.

The ARC interface shows account, contacts, and related records in one view, letting users navigate among related records.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

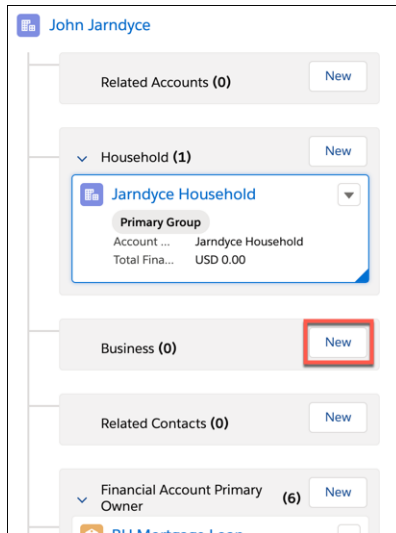
Users can act on the information they see in the ARC interface in many ways:

- Create account-contact relationships, like adding a member to a household account.
- Create account-account relationships, like relating an accounting firm in an Advisor role to a business account.
- Edit account-account and account-contact relationships.
- Create related records for an account, such as a new Financial Account for a person, or a new Opportunity for a business account.

 **Note:** To create, edit, or remove relationships and related records for an account, the user must have Read/Write access to the account record.

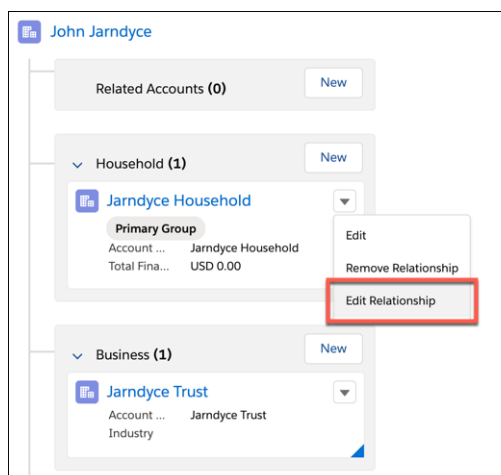
For example, to capture the relationship between a person and the business they work for, add a business relationship as follows:

1. From the account page for a person account, click the **ARC** tab.
2. On the Business card in the ARC interface, click **New**.



3. On the standard form for creating an Account-Contact Relationship, enter details about the person's membership and role in the business.

4. Click in the Account field. Search for and select a business account, or select **+ New Account** to create a new business account.
5. Click **Save**.
6. The new business account relationship appears in the ARC interface. If the relationship does not show in the list immediately, refresh the page to load it.
7. To edit an existing relationship, click the down arrow on the related account's card and select **Edit Relationship**.



Considerations and Limitations for Actionable Relationship Center

Here are some things to keep in mind when you implement Actionable Relationship Center (ARC).

General

There's no limit to the number of relationship columns you can display in ARC.

ARC displays up to 10 related lists that have a configured compact layout.

ARC isn't available in the Salesforce mobile app.

Record cards only show the first two fields that appear on the associated record's compact layout.

ARC cards show actions based on available actions in the record page layout.

Custom actions can be added to record previews, but not to record cards.

ARC supports the following screen resolutions for Internet Explorer 11:

- 1920 x 1080
- 1600 x 1200
- 1440 x 900
- 1366 x 768

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

ARC - Financial Services Cloud Component

The ARC - Financial Services Cloud component isn't available in Experience Cloud.

The ARC - Financial Services Cloud component isn't extensible to packages.

When ARC - Financial Services Cloud is a stand-alone component on a page layout, the record preview border in ARC is the background color. When ARC - Financial Services Cloud is embedded in a tab component, the record preview border in ARC is white.

Lightning Web Components don't support preview capability for Internet Explorer 11. See *Get Started with Salesforce: Considerations for Microsoft Internet Explorer* for more information.

 **Important:** Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- This change doesn't impact Salesforce Classic.

Some objects have no Lightning Web Component compact layouts defined and, as a result, have no preview capability. For Lightning Web Components without preview capability, the record preview is a blank sidebar web component. See *User Interface API Developer Guide: Supported Objects* for more information.

The Notes & Attachment cards don't have customizable compact layouts. These cards always display the Last Modified Date and File Type fields.

SEE ALSO:

[Get Started with Salesforce: Considerations for Microsoft Internet Explorer](#)

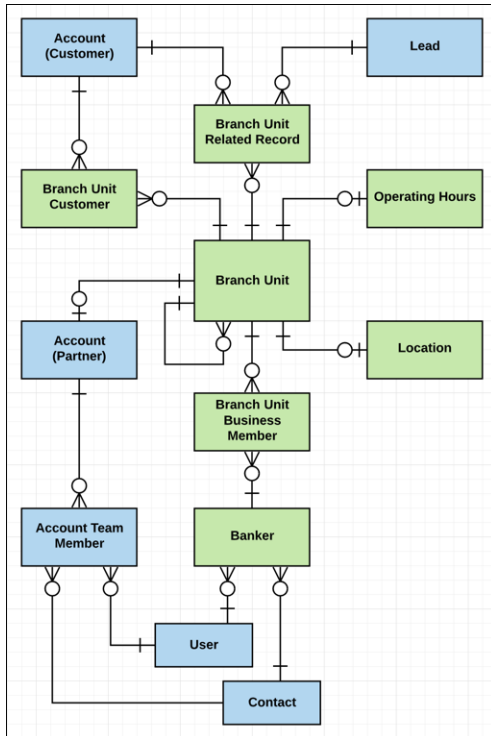
[Get Started with Salesforce: Supported Browsers for Lightning Experience](#)

[User Interface API Developer Guide : Supported Objects](#)

Branch Management

Track branch performance and productivity with Branch Management. The Branch Management data model, console app, and branch association engine (beta) let branch managers and administrators track the work output of branches, employees, and customer segments in Financial Services Cloud. Branch Management works seamlessly with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

The Branch Management data model lets you define your branch structure and employee and partner assignments so you can track activities and performance by branch.

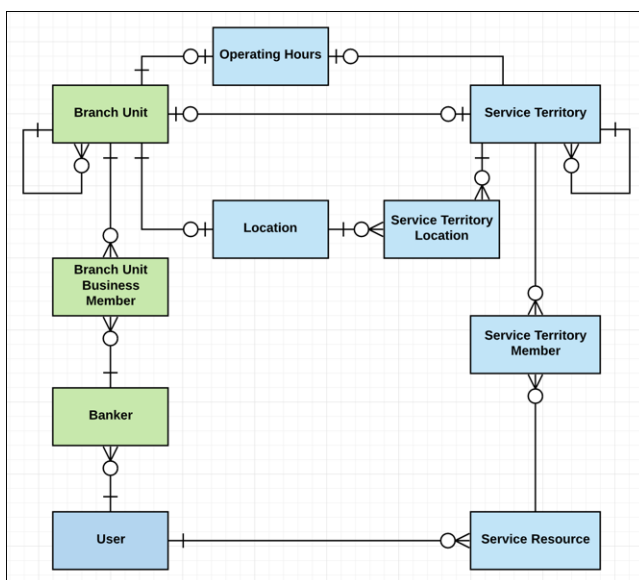


Branch Unit is the central object in the branch management data model. Branch unit records store basic information such as the branch's name, its parent branch, and its branch manager. Capture more branch information by relating objects like Location and Operating Hours.

The Banker object represents a user or contact who can fill a banker role for one or more branches. Banker is a Branch Unit Business Member type that's predefined for the banking industry.

Attribute customers and other records to specific branches using the Branch Unit Customer and Branch Unit Related Record objects.

Branch managers can align branch hierarchies with service territories and account hierarchies as needed. Optionally link branches and associated records to the key Service Cloud objects (Service Territory, Service Territory Member, and Service Resource) that power Lightning Scheduler and Field Service Lightning.



Configure Branch Management

Configure your org to get the most from Branch Management features.

Work with Branch Management

The Branch Console app gives users quick access to branch management features in one place. Branch managers or admin users define branch units and hierarchies, and enable bankers and other business members for assignment to specific branches. Bankers and other user users or contacts select the branch they are currently assigned to, so that the work they do with leads and accounts gets automatically attributed to the correct branch.

Configure Branch Management

Configure your org to get the most from Branch Management features.

Set up a permission set and object permissions, and enable automatic branch associations.

Assign Permissions to Users

Ensure that users can access and use Branch Management features by creating and assigning permission sets.

Grant Access to Branch Management Objects

To create and edit branch units and related records, users need access to branch management objects.

Enable Automatic Branch Association

To automatically attribute new lead and account activities to the user's currently assigned branch, enable the branch association setting.

Add the Branch Selector Component to Apps

Place the Branch Selector utility bar component in your Salesforce app to let bankers choose their current branch while working.

Assign Permissions to Users

Ensure that users can access and use Branch Management features by creating and assigning permission sets.



Note: The **User license to access Branch Management in Financial Services Cloud** permission is enabled by default if your organization has the Financial Services Cloud Extension or Financial Services Cloud Comprehensive permission set.


1. Create a permission set with the Branch Management permissions enabled.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
 - b. Click **Clone** next to the Financial Services Cloud Extension permission set (or the Financial Services Cloud Comprehensive permission set, if your org has that instead).
 - c. Enter a label for your permission set, such as *FSC with Branch Management*.
 - d. Clear the API name field and then tab to the next field, so the API name fills in automatically.
 - e. (Optional) Change the Description field if desired.
 - f. Click **Save**.
 - g. In the Permission Sets list, click the name of the permission set you just created to edit it.
 - h. Click the **System Permissions** link.
 - i. Click **Edit**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- j. Enable the **User license to access Branch Management in Financial Services Cloud** permission.
 - k. Click **Save**.
2. Assign the permission set to users.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
 - b. Click the name of the permission set that you created earlier, such as **FSC with Branch Management**.
 - c. Click **Manage Assignments**, and then click **Add Assignments**.
 - d. Select the checkbox for each user who will use branch management features, and then click **Assign**.

 **Note:** You can only assign a permission set license to active users.

SEE ALSO:

[Salesforce Help: Licenses Overview](#)

[Financial Services Cloud Permission Set Licenses](#)

Grant Access to Branch Management Objects

To create and edit branch units and related records, users need access to branch management objects.

To use branch management features a user needs access to branch management objects, including Branch Unit, Branch Unit Business Member, Branch Unit Customer, and Branch Unit Related Record. If the Banker object is used as the business member for branches, users need access to that object too.

To validate or grant a user's access levels for the branch management objects:

1. From Setup, enter *Profiles* in Quick Find, then select **Profiles**.
2. Click the **Edit** link next to the profile you want to change.
3. Click **Object Settings**.
4. Click **Branch Units**. Validate that this profile has Read, Create, Edit, and Delete permissions to the Branch Unit object. If not, grant those permissions and click **Save**.
5. Repeat this step for **Branch Unit Business Members**, **Branch Unit Customers**, and **Branch Unit Related Records**.
6. If your org uses Banker as the business member object for branch assignments, click **Bankers**. Validate that this profile has Read, Create, Edit, and Delete permissions to the Banker object. If not, grant those permissions and click **Save**. If your org uses a different object for the business member relationship, grant permissions for that object instead.
7. Repeat steps 2 through 6 for any other user profiles you want to change.

SEE ALSO:

[Salesforce Help: Edit Object Permissions in Profiles](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable Automatic Branch Association

To automatically attribute new lead and account activities to the user's currently assigned branch, enable the branch association setting.

To enable automatic branch association:

1. From Setup, enter *Branch* in Quick Find. Under the Branch Management heading, click **Branch Association Settings**.
2. To enable automatic branch association support, set the toggle to **On**.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Add the Branch Selector Component to Apps

Place the Branch Selector utility bar component in your Salesforce app to let bankers choose their current branch while working.

 **Note:** You can add Utility Bar components to apps whose App Type is Lightning, but not to Lightning (Managed) apps.

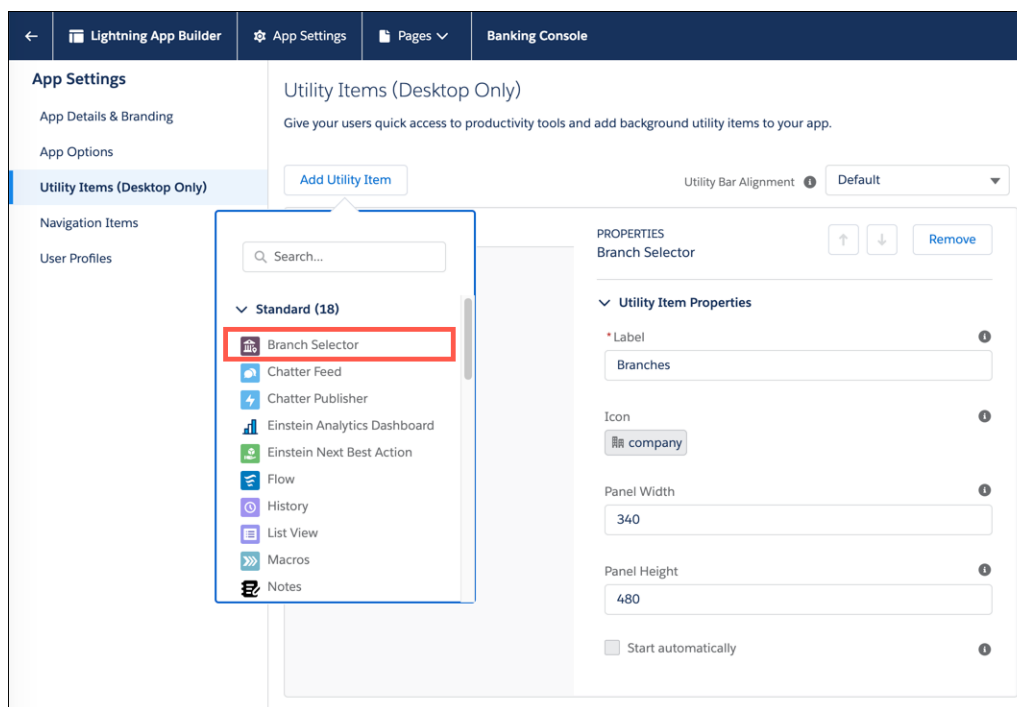
To add the Branch Selector component:

1. From Setup, enter *App Manager* in Quick Find. Then select **App Manager**.
2. Edit an existing Lightning app or click **New Lightning App**.
3. In the left-hand menu, click **Utility Items (Desktop Only)**.
4. Click **Add Utility Item** and select **Branch Selector**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



5. Change the Utility Item Properties if you want. The properties include the Label, Icon, Panel Width and Panel Height.

6. Click **Save**.

Work with Branch Management

The Branch Console app gives users quick access to branch management features in one place. Branch managers or admin users define branch units and hierarchies, and enable bankers and other business members for assignment to specific branches. Bankers and other user users or contacts select the branch they are currently assigned to, so that the work they do with leads and accounts gets automatically attributed to the correct branch.

Branch Management also includes predefined report types so you can create reports and dashboards to gain insight into branch performance and productivity.

Create Branch Unit Records

Define your branches and branch hierarchy by creating branch unit records.

Create Banker Records

The Banker object represents users or contacts who are authorized to work in a banking capacity for one or more branches over time. Add banker records to let users view the branches they can work with, and choose their current branch for work attribution purposes.

Choose Your Current Branch with the Branch Selector

A user who has active banker assignments can select their current branch using the Branch Selector utility bar component.

Considerations and Limitations for Branch Management

Here are some things to keep in mind as you implement Branch Management features.

Create Branch Unit Records

Define your branches and branch hierarchy by creating branch unit records.

A branch unit record stores information about a specific branch office, location, or organizational unit. You can define a hierarchy of branch units by using the Parent Branch field. You can optionally assign a user or contact to each branch unit as the branch manager.

Branch unit records can relate to Service Territory records to integrate with Service Cloud. They can also relate to account records to capture additional information about each branch, such as partner account information.

To create a new branch unit record:

1. From the Branch Management Console App, select **Branches** from the dropdown menu.
2. On the Branches tab, click **New**.
3. In the New Branch modal, enter a Name and (optionally) a Branch Code.
4. If the branch relates to an account, like an account representing a partner than runs the branch of business, click
5. Select the branch type in the **Type** dropdown.
6. (Optional) Specify values for the **Operational State**, **Start Date**, and **End Date**. If you specify the dates, make sure that today's date is within the start and end dates for the new branch to be immediately usable.
7. Click **Active** to activate the new branch, then click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

New Branch Unit

Information

*Name: 10 State Street

Branch Code: BR005

Branch Manager: Sarah Matthews

Parent Branch: 1 Market Street

*Type: Physical and Virtual

Operational State: --None--

Start Date: 1/1/2021

End Date: 12/31/2021

Location: Search Locations...

Operating Hours: Pacific

Account: 10 State St

Service Territory: Pacific

Active: ☒

Buttons: Cancel, Save & New, Save

Create Banker Records

The Banker object represents users or contacts who are authorized to work in a banking capacity for one or more branches over time. Add banker records to let users view the branches they can work with, and choose their current branch for work attribution purposes.

First make sure that you have a user who's ready to be assigned to a branch as a banker. Then, to create a banker record:

1. From the Branch Management Console app, select **Bankers** from the dropdown menu.
2. On the Bankers tab, click **New**.
3. A banker record represents a user or contact assignment to a specific branch unit. In the Name field, enter the name of the banker user, or a combination of the banker's name and the branch name.
4. In the New Banker window, select the **People** icon from the Business Member dropdown, and then select **Search People**.
5. Select an active branch from the Branch dropdown. Click the **Active** checkbox to activate this banker assignment.
6. (Optional) Enter values for the **Job Code**, **Level**, **Description**, **Start Date**, and **End Date**.
7. Click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Choose Your Current Branch with the Branch Selector

A user who has active banker assignments can select their current branch using the Branch Selector utility bar component.

To select your user's current branch:

1. Log in as a user who has active assignments to one or more active branches as a banker.
2. Click **Branches** on the left of the utility bar at the bottom of the screen.
3. A popup lists all the branches where your user can work as a banker. Your current branch shows at the top of the list with a check mark. To change the current branch for this user, select a different branch in the list.
4. When this user creates lead or account records, those records are attributed to the user's current branch as shown in the Branch Selector component.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Considerations and Limitations for Branch Management

Here are some things to keep in mind as you implement Branch Management features.

If you want to associate branches with underlying accounts, consider creating a record type for those accounts so you can keep them separate from other accounts, like customers and prospects.

There are no limits to the number of Branches or Bankers you can create.

A maximum of 100 branches can be shown in the Branch Selector component.

We recommend that you deactivate branches rather than deleting them if you are considering closing a branch and reallocating bankers.

The Branch Selector component is not certified to work on Mobile.

Branch hierarchies and related service territory hierarchies are not automatically synchronized.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

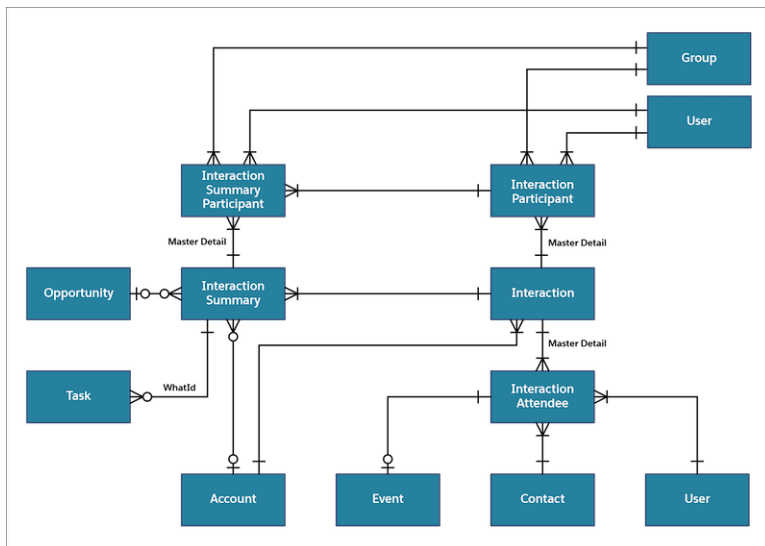
Available in: **Professional**, **Enterprise**, and **Unlimited** editions.

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.

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.

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 or account page.
 - a. On the home page or the account record page, click the Setup icon, and select **Edit Page**.
 - b. Drag the Interaction Summaries component to the page.
 - c. 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.

EDITIONS


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

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.

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**.
 - c. Enable **Interaction Summary**.

SEE ALSO:

[Sharing Settings](#)

[Compliant Data Sharing in Financial Services Cloud](#)

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

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

[Create an Interaction](#)

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

[Add Attendees to an Interaction](#)

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

Share an Interaction

Give users access to existing interactions. There are two ways to share an interaction record. 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

Give users access to existing interaction summaries. There are two ways to share an interaction summary record. You can share a record from the Interaction Summary Participants related list or use the Manage Participants component to share records.

Search Interaction Summaries

Bankers and financial advisors can quickly find and review past interaction summaries to be better prepared for their next meeting. They can search a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine now uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

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

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

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.

EDITIONS

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

6. Save your changes.

SEE ALSO:

[Enable and Configure Interaction Summaries](#)

Share an Interaction

Give users access to existing interactions. There are two ways to share an interaction record. 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](#)

Give users access to a record without writing complex code. 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](#)

Help bankers and financial advisors easily share interactions with multiple participants at a time in a compliant manner. When you add the new Manage Participant component to an interaction record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

Share an Interaction from the Interaction Participants Related List

Give users access to a record without writing complex code. 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.

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

1. On 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.

Share an Interaction Using the Manage Participants Component

Help bankers and financial advisors easily share interactions with multiple participants at a time in a compliant manner. When you add the new Manage Participant component to an interaction record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them 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, and select **Edit Page**.
 - b. Drag the Manage Participants component to the page layout.
 - c. Save your changes.

EDITIONS

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

2. Configure the suggestions list.
 - a. On the interaction record page, click the Setup icon, and select **Edit Page**.
 - b. Click anywhere on the Manage Participants component to select it.
 - c. In the properties pane, under Participant Types for Suggestion List, click **Select**.
 - d. Move the required participant types to the Selected list and click **OK**.
 - e. Save your changes.
3. Add users or groups as participants.
 - a. On an interaction record page, on the Manage Participants component, click **Add**.
 - b. Search for users or groups or select them from the Suggested Users or Groups section to add them as participants to the record.
 - c. Click **Next**.
 - d. Select a participant role for every user or group, enter comments, and select **Active**.
 - e. Click **Finish**.
 - f. Save your changes.

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.
5. Save your changes.

SEE ALSO:

[Enable and Configure Interaction Summaries](#)

EDITIONS

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

Share an Interaction Summary

Give users access to existing interaction summaries. There are two ways to share an interaction summary record. You can share a record from the Interaction Summary Participants related list or use the Manage Participants component to share records.

[Share an Interaction Summary from the Interaction Summary Participants Related List](#)

Give users access to a record without writing complex code. 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

Help deal teams easily share interaction summaries with multiple participants at a time in a compliant manner. 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 also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

Share an Interaction Summary from the Interaction Summary Participants Related List

Give users access to a record without writing complex code. 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.

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

1. On 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.

Share an Interaction Summary Using the Manage Participants Component

Help deal teams easily share interaction summaries with multiple participants at a time in a compliant manner. 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 also assign roles from within the component. The component also provides them 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, and select **Edit Page**.
 - b. Drag the Manage Participants component to the page layout.
 - c. Save your changes.
2. Configure the suggestions list.
 - a. On the interaction summary record page, click the Setup icon, and select **Edit Page**.
 - b. Click anywhere on the Manage Participants component to select it.
 - c. In the properties pane, under Participant Types for Suggestion List, click **Select**.
 - d. Move the required participant types to the Selected list and click **OK**.
 - e. Save your changes.
3. Add users or groups as participants.
 - a. On an interaction summary record page, on the Manage Participants component, click **Add**.
 - b. Search for users or groups or select them from the Suggested Users or Groups section to add them as participants to the record.
 - c. Click **Next**.

EDITIONS

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

- d. Select a participant role for every user or group, enter comments, and select **Active**.
- e. Click **Finish**.
- f. Save your changes.

Search Interaction Summaries

Bankers and financial advisors can quickly find and review past interaction summaries to be better prepared for their next meeting. They can search a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine now uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

Add the Interaction Summaries component to the home or account page so bankers and financial advisors can search for interaction summaries. And they can use the wildcard character asterisk (*) in a search query, such as *Joe Sm**. The component also supports infinite scroll to load interaction summaries. Click the **Show More** link at the bottom of the component to access all the interaction summary records.

The search engine in the Interaction Summaries component uses the Salesforce Object Search Language (SOSL) to retrieve the search results. It looks for matches to the search term across a maximum of 2,000 records. If you are searching from more than 2,000 records, then we recommend using the filters in the Interaction Summary component for more selective search results.

Compliant Data Sharing in Financial Services Cloud

The Compliant Data Sharing feature lets administrators and compliance managers configure advanced data sharing rules, so that they can improve compliance with regulations and company policies. They can control and monitor what data gets shared with whom, without writing complex code.

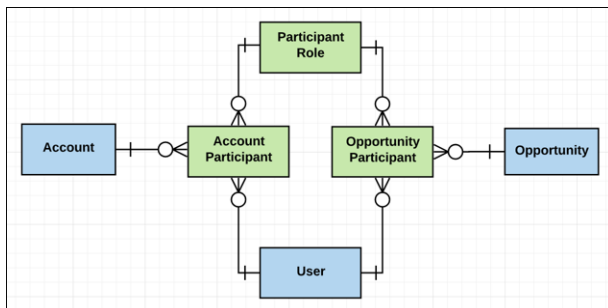
Compliant Data Sharing uses a setup object and several junction objects:

- **Participant Role:** A setup object that defines an available role for a parent object and an associated data access level.
- **Account Participant:** A junction object that stores a relationship between a user or participant group, a participant role, and an account record. Account participants for a record are shown in the Account Participants related list.
- **Opportunity Participant:** A junction object that stores a relationship between a user or participant group, a participant role, and an opportunity record. Opportunity participants for a record are shown in the Opportunity Participants related list.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



Compliant Data Sharing also supports Interaction Summaries using the Interaction Summary Participant junction object.

Control Who Sees What with Compliant Data Sharing

Financial Services Cloud provides Compliant Data Sharing in addition to the other methods that Salesforce offers for sharing data.

[Configure Your Org for Compliant Data Sharing](#)

Configure your org to get the most from the advanced data sharing capabilities of the Compliant Data Sharing feature.

[Manage Participant Roles in Compliant Data Sharing](#)

Compliant Data Sharing uses participant roles to define how users and participant groups relate to a record. Each participant role specifies the access level it grants to a record when assigned to a participant.

[Configure Page Layouts for Compliant Data Sharing](#)

Add related lists that display object participants to page layouts.

[Manage Users in Compliant Data Sharing](#)

Assign the Compliant Data Sharing permissions and object access to users depending on their needs. After a user is assigned a participant role for a record or as a member of a participant group, they can't be deactivated. Delete all associated junction objects and remove them from all participant groups before deactivating them.

[Manage Participant Groups in Compliant Data Sharing](#)

Compliant Data Sharing uses participant groups to define groups of users who play the same role in their record interactions.

[View Record Access Levels for Compliant Data Sharing Users](#)

To see users who have access to a record, use the Sharing button on the record's detail page.

[Considerations and Limitations for Compliant Data Sharing](#)

Here are some things to keep in mind when you implement Compliant Data Sharing (CDS).

SEE ALSO:

[Salesforce Help: Create a Many-to-Many Relationship](#)

[Salesforce Help: Control Who Sees What](#)

[Capture and Share Interaction Summaries](#)

Control Who Sees What with Compliant Data Sharing

Financial Services Cloud provides Compliant Data Sharing in addition to the other methods that Salesforce offers for sharing data.

Compliant Data Sharing works with other Salesforce data sharing features.

When a user or a participant group is assigned as a participant for a record, a junction object is created. However, share table entries are only created when the associated participant role's access level is greater than the org-wide default for the parent object. Changes to org-wide defaults for the parent object also affect share table entries for existing participant junction objects.

For example, the org-wide sharing setting for Account and Contact is Public Read/Write. You assign Hana Singh as a participant to the Smith Corporation with the Inside Rep role that has Read/Write access. An account participant record is created that connects Hana Singh as an Inside Rep for the Smith Corporation. The Inside Rep role's access is equal to the org-wide default access for the Account object, however, so no sharing table record is created. Change the org-wide default access for Account and Contract to Private, and a share table record is automatically created for the existing junction object. Change the org-wide default access back to Public Read/Write, and the share table entry for the junction object is deleted.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Who Has Access to Account Records with Compliant Data Sharing?](#)

Compliant Data Sharing in Financial Services Cloud allows account record owners the ability to grant access to their account records to other Financial Services Cloud users. Users above the record owner in the role hierarchy and non-record owners with edit access granted through Compliant Data Sharing have the same ability as record owners.

[Who Has Access to Opportunity Records with Compliant Data Sharing?](#)

Compliant Data Sharing in Financial Services Cloud allows opportunity record owners the ability to grant access to their opportunity records to other Financial Services Cloud users. Users above the record owner in the role hierarchy and non-record owners with edit access granted through Compliant Data Sharing have the same ability as record owners.

SEE ALSO:

[Salesforce Help: Control Who Sees What](#)

Who Has Access to Account Records with Compliant Data Sharing?

Compliant Data Sharing in Financial Services Cloud allows account record owners the ability to grant access to their account records to other Financial Services Cloud users. Users above the record owner in the role hierarchy and non-record owners with edit access granted through Compliant Data Sharing have the same ability as record owners.

Compliant Data Sharing works with other Salesforce data sharing features. When an account record is shared using Compliant Data Sharing, an account participant record is created. It contains:

- The user with the Use Compliant Data Sharing permission or a participant group to be granted access.
- The participant role that defines the level of record access.

To see a list of users who have access to a record and the reason for that access, click the **Sharing** button on the account detail page in Salesforce Classic. Click **Expand List** to see all users who have access.

Sharing table records aren't created for users whose granted access is less than the organization-wide default access. This behavior includes account participants whose participant role grants less access than is available through organization-wide data sharing defaults for the Account object.

SEE ALSO:

[Salesforce Help: Who Has Access to Account Records?](#)

[Salesforce Help: View Users with Compliant Data Sharing Record Access](#)

[Salesforce Help: Who Has Access to Account Records?](#)

Who Has Access to Opportunity Records with Compliant Data Sharing?

Compliant Data Sharing in Financial Services Cloud allows opportunity record owners the ability to grant access to their opportunity records to other Financial Services Cloud users. Users above the record owner in the role hierarchy and non-record owners with edit access granted through Compliant Data Sharing have the same ability as record owners.

Compliant Data Sharing works with other Salesforce data sharing features. When an opportunity record is shared using Compliant Data Sharing, an opportunity participant record is created. It contains:

- The user with the Use Compliant Data Sharing permission or a participant group to be granted access.
- The participant role that defines the level of record access.

To see a list of users who have access to a record and the reason for that access, click the **Sharing** button on the opportunity detail page in Salesforce Classic. Click **Expand List** to see all users who have access.

Sharing table records aren't created for users whose granted access is less than the organization-wide default access. This behavior includes opportunity participants whose participant role grants less access than is available through organization-wide data sharing defaults for the Opportunity object.

Private Opportunities

You can't assign opportunity participants to an opportunity set to **Private**.

If an opportunity record has opportunity participants with associated share table entries, the share table records are deleted when **Private** is enabled for the opportunity. The opportunity participant records aren't deleted when **Private** is enabled for the opportunity. It's recommended that you manually delete opportunity participants for an opportunity before you enable **Private** for that opportunity.

If a private opportunity has opportunity participants and **Private** is disabled, share table records aren't created. To grant access to existing opportunity participants, delete and recreate the opportunity participant records.

SEE ALSO:

[Salesforce Help: View Users with Compliant Data Sharing Record Access](#)

[Salesforce Help: Who Has Access to Account Records?](#)

Configure Your Org for Compliant Data Sharing

Configure your org to get the most from the advanced data sharing capabilities of the Compliant Data Sharing feature.

[Set Org-Wide Sharing Defaults for Compliant Data Sharing](#)

To get the benefits of Compliant Data Sharing, set org-wide sharing settings for supported objects to Private or Public Read-Only.

[Enable Compliant Data Sharing for Objects](#)

The Compliant Data Sharing feature can be enabled on an object-by-object basis. The first objects to support Compliant Data Sharing are the Account and Opportunity objects.

Set Org-Wide Sharing Defaults for Compliant Data Sharing

To get the benefits of Compliant Data Sharing, set org-wide sharing settings for supported objects to Private or Public Read-Only.

Compliant Data Sharing works when a supported object's org-wide sharing default is Private or Public Read-Only. If the sharing default is set to Public Read/Write, everyone can access that object and Compliant Data Sharing has no effect on a participant's access to a record.

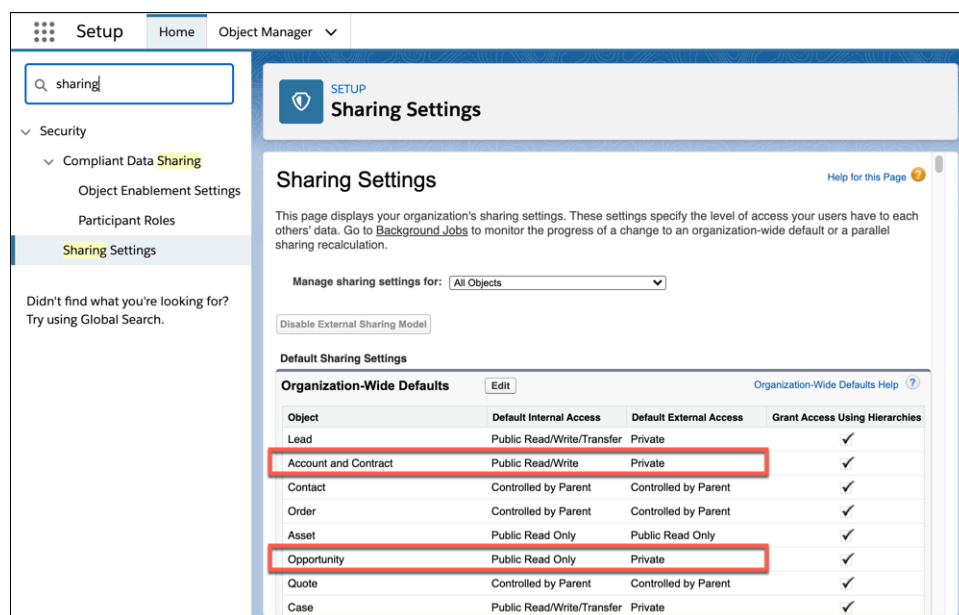
To review and update org-wide sharing settings for the Account and Opportunity objects:

1. From Setup, in the Quick Find box, enter *Sharing*, and then select **Sharing Settings**.
2. Under Organization-Wide Defaults, review the access levels for the Account and Opportunity objects. By default, the sharing setting for Account and Contract is Public Read/Write, and the sharing setting for Opportunity is Public Read Only.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



Note: Before changing an org-wide sharing setting away from Public Read/Write, consider the impact on current business processes. Changing to Public Read Only or Private prevents some users from seeing or editing records until Compliant Data Sharing setup is complete and participant roles are assigned.

3. To change an access level, click **Edit**.
4. For each object, select the default access you want to use.
5. Save your changes.

SEE ALSO:

[Control Who Sees What with Compliant Data Sharing](#)

[Salesforce Help: Organization-Wide Sharing Defaults](#)

[Salesforce Help: Set Your Organization-Wide Sharing Defaults](#)

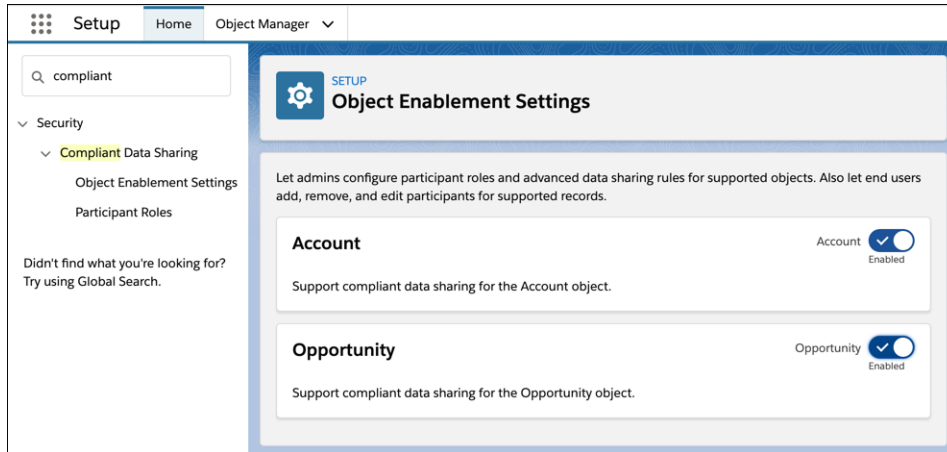
Enable Compliant Data Sharing for Objects

The Compliant Data Sharing feature can be enabled on an object-by-object basis. The first objects to support Compliant Data Sharing are the Account and Opportunity objects.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



To enable Compliant Data Sharing for Accounts and Opportunities:

1. From Setup, in the Quick Find box, enter *Object Enablement Settings*, and then click **Object Enablement Settings**.
2. To enable Compliant Data Sharing support for the Account object, set the Account toggle to **Enabled**.
3. To enable Compliant Data Sharing support for the Opportunity object, set the Opportunity toggle to **Enabled**.



Note: To later disable Compliant Data Sharing for an object, you must first delete any participant roles associated with that object.

Manage Participant Roles in Compliant Data Sharing

Compliant Data Sharing uses participant roles to define how users and participant groups relate to a record. Each participant role specifies the access level it grants to a record when assigned to a participant.



Note: A user who has a participant role assigned for a record or who belongs to a participant group can't be deactivated. Delete their participant records and remove them from all participant groups before deactivating them.

Add Participant Roles for Compliant Data Sharing Enabled Objects

After Compliant Data Sharing is enabled for objects, create participant roles for them.

Review and Edit Participant Roles for Compliant Data Sharing

View, change, and delete participant roles from the Participant Roles page in Setup.

Add Participant Roles for Compliant Data Sharing Enabled Objects

After Compliant Data Sharing is enabled for objects, create participant roles for them.

Participant Roles define the available roles and associated record access that a user can be assigned for each object enabled for Compliant Data Sharing.



Note: A maximum of 10 participant roles can be active for each object enabled for Compliant Data Sharing.

1. From Setup, in the Quick Find box, enter *Participant*, and then select **Participant Roles**.
2. On the Participant Roles Setup page, click **New**.
3. Enter a name, such as *Advisor*.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

4. Select a parent object, such as **Account** or **Opportunity**.
5. Select **Active**.
6. Enter an API name or use the system default.
7. Select a default access level.
8. Click **Save**.

SEE ALSO:

[Set Org-Wide Sharing Defaults for Compliant Data Sharing](#)

Review and Edit Participant Roles for Compliant Data Sharing

View, change, and delete participant roles from the Participant Roles page in Setup.


You can rename, activate or deactivate, or change the default access level for a participant role on the Participant Roles Setup page.


EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

1. From Setup, in the Quick Find box, enter *Compliant*, and then select **Participant Roles**. If Participant Roles exist, a list of existing roles is shown.
2. To delete a participant role that hasn't been used, click **Del** next to its name.

 **Note:** You can't delete or deactivate a participant role that has existing account participant or opportunity participant records. Delete the participant records first.
3. Click **Edit** next to a participant role to see its details.
4. You can change names, the default access level, and whether the role is active. You can't change a role's parent object.

 **Note:** To deactivate a participant role, deselect Active.
5. Click **Save**.

 **Note:** When the default access level is changed for a role, it triggers updates to share table entries for all records that have been assigned that role. The update process can take some time to complete. When the update completes, a notification email is sent and an entry is added to the Setup Audit Trail describing the changes.

SEE ALSO:

[Salesforce Help: Monitor Setup Changes with Setup Audit Trail](#)

Configure Page Layouts for Compliant Data Sharing

Add related lists that display object participants to page layouts.

[Add the Account Participants Related List to Page Layouts](#)

Include the Account Participants related list on page layouts for the account record types that you use.

[Add the Opportunity Participants Related List to Page Layouts](#)

Include the Opportunity Participants related list on page layouts for the opportunity record types that you use.

[Add the Sharing Button to Page Layouts for Compliant Data Sharing](#)

Use the Sharing button on Account and Opportunity page layouts in Salesforce Classic to allow users to review the detailed sharing rows in effect for those records.

Add the Account Participants Related List to Page Layouts

Include the Account Participants related list on page layouts for the account record types that you use.

Add the Account Participants related list to page layouts for Account record types.

1. From Setup, open **Object Manager** and select **Account**.

 **Note:** To add the Account Participants related list to a page layout for a Person Account record type, select **Person Account** instead of **Account** in Object Manager.

2. Open **Page Layouts**.
3. Select the layout for the record type to use. For example, select **Account (Business) Layout**.
4. In the object palette, select **Related Lists**.
5. Drag the **Account Participants** field from the object palette to the **Related Lists** container.
6. Click **Save** in the object palette to save the page layout changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Add the Opportunity Participants Related List to Page Layouts

Include the Opportunity Participants related list on page layouts for the opportunity record types that you use.

Add the Opportunity Participants related list to page layouts for opportunity record types.

1. From Setup, open **Object Manager** and click **Opportunity**.
2. Open **Page Layouts**.
3. Select the layout for the record type to use. For example, select **Opportunity (Business) Layout**.
4. In the object palette, select **Related Lists**.
5. Drag the **Opportunity Participants** field from the object palette to the **Related Lists** container.
6. Click **Save** in the object palette to save the page layout changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Add the Sharing Button to Page Layouts for Compliant Data Sharing

Use the Sharing button on Account and Opportunity page layouts in Salesforce Classic to allow users to review the detailed sharing rows in effect for those records.

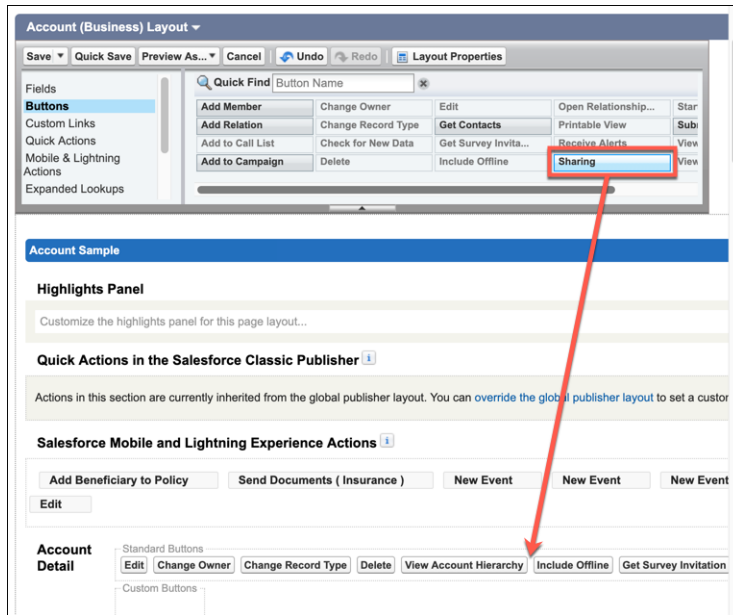
Available in: Salesforce Classic

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



Note: Complete these steps in Salesforce Classic.

1. From Setup, in the Quick Find box, enter *Accounts*, and then select **Page Layouts**.
2. Click **Edit** next to the layout to change.
3. In the object palette, select **Buttons**.
4. Drag the **Sharing** tile into the button list in the **Account Detail** section.



5. Click **Save** on the object palette.
6. Repeat steps 1 through 5 to update page layouts for Opportunities and Person Accounts.

SEE ALSO:

[Salesforce Help: Why can't I see the Sharing button on a record in Salesforce Classic?](#)

Manage Users in Compliant Data Sharing

Assign the Compliant Data Sharing permissions and object access to users depending on their needs. After a user is assigned a participant role for a record or as a member of a participant group, they can't be deactivated. Delete all associated junction objects and remove them from all participant groups before deactivating them.

[Create Permission Sets for Compliant Data Sharing](#)

To allow users the ability to configure and use Compliant Data Sharing, create Compliant Data Sharing permission sets.

[Assign Permissions to Users for Compliant Data Sharing](#)

To let users configure and use the Compliant Data Sharing feature, assign them appropriate permission.

[Grant User Access to Account, Opportunity, and Participant Objects and Fields in Compliant Data Sharing](#)

To create and edit participant records, users need access to the parent objects and to the participant object's Active field.

[Deactivate a Financial Services Cloud Compliant Data Sharing User](#)

A user with account participant, opportunity participant, or participant group member records can't be deactivated until their associated records have been deleted. If you attempt to deactivate the user before deleting these records, you see an error message linking to one of the records that must be deleted.

Create Permission Sets for Compliant Data Sharing

To allow users the ability to configure and use Compliant Data Sharing, create Compliant Data Sharing permission sets.

Create a permission set for Compliant Data Sharing users and a permission set for users who configure Compliant Data Sharing.


1. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
2. Create a permission set for Compliant Data Sharing users.
 - a. On the Permission Sets Setup page, click **New**.
 - b. Enter a name for the permission set like *Compliant Data Sharing User*.
 - c. Enter an API Name for the permission set or use the system default.
 - d. Enter a description for the permission set.
 - e. Set License to **None**, and then click **Save**.
 - f. On the Compliant Data Sharing User Permission Set page, under System, click **System Permissions**, and then click **Edit**.
 - g. Under System, enable Use Compliant Data Sharing.
 - h. Click **Save**. If a Permission Changes Confirmation window appears, click **Save**.

3. Create a permission set for users who configure and manage participant roles and participant groups.

- a. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
- b. Click **Clone** next to the permission set you created in Step 2.
- c. Enter a name for the permission set like *Compliant Data Sharing Manager*.
- d. Enter an API Name for the permission set.

 **Note:** You can't use the existing API name. To have Salesforce generate a system default, manually clear the API name field,

- a. Enter a name for the permission set like *Compliant Data Sharing Manager*.
- b. Enter a description for the permission set.
- c. Click **Save**.
- d. On the Permission Sets Setup page, click the name of the clones permission set you created in Step 3b.
- e. On the Compliant Data Sharing User Permission Set page, under System, click **System Permissions**, and then click **Edit**.
- f. Under System, enable Configure Compliant Data Sharing.
- g. (Optional) Under System, disable Use Compliant Data Sharing.

 **Note:** The Use Compliant Data Sharing permission allows a user to be a Compliant Data Sharing participant and a member of a participant group.

- h. Click **Save**. If a Permission Changes Confirmation window appears, click **Save**.

Assign the permission sets to users.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Assign Permissions to Users for Compliant Data Sharing

To let users configure and use the Compliant Data Sharing feature, assign them appropriate permission.

Ensure that Compliant Data Sharing is enabled for one or more objects in your organization.

Create the permission sets for both using and configuring Compliant Data Sharing before attempting to assign them to users. Also ensure that users have already been assigned the required permission set license.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
2. On the Permission Sets Setup page, click name of the permission set to assign. For instance, if you created a Compliant Data Sharing User permission set, click **Compliant Data Sharing User**.
3. Click **Manage Assignments**, and then click **Add Assignments**.
4. To assign the permission set, select users and then click **Assign**.



Note: You can only assign a permission set to active users.

SEE ALSO:

[Create Permission Sets for Compliant Data Sharing](#)

[Financial Services Cloud Permission Set Licenses](#)

[Enable Compliant Data Sharing for Objects](#)

[Salesforce Help: Licenses Overview](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Grant User Access to Account, Opportunity, and Participant Objects and Fields in Compliant Data Sharing

To create and edit participant records, users need access to the parent objects and to the participant object's Active field.

Account and Account Participant objects share a master-detail relationship, as do the Opportunity and Opportunity Participant objects. As such, participant record level access derives from the parent Account or Opportunity object.

A user's profile must allow read, create, edit, and delete access to the parent object for a user to create, edit, and delete related participant records. Users also need read and edit access to the Active field on the participant object.

To validate a user's access levels for the Account and Opportunity objects and related participant fields:

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click **Edit** next to the profile you want to change.
3. Click **Object Settings**.
4. Click **Account**. Validate that this profile has Read, Create, Edit, and Delete permissions to the Account object. If not, grant those permissions and click **Save**.
5. Click **Account Participant**. Validate that this profile has Read Access and Edit Access for the Active field. If not, grant those permissions and click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

6. Click **Opportunity**. Validate that this profile has Read, Create, Edit, and Delete permissions to the Opportunity object. If not, grant those permissions and click **Save**.
7. Click **Opportunity Participant**. Validate that this profile has Read Access and Edit Access for the Active field. If not, grant those permissions and click **Save**.
8. Repeat steps 3 through 8 for other affected user profiles.

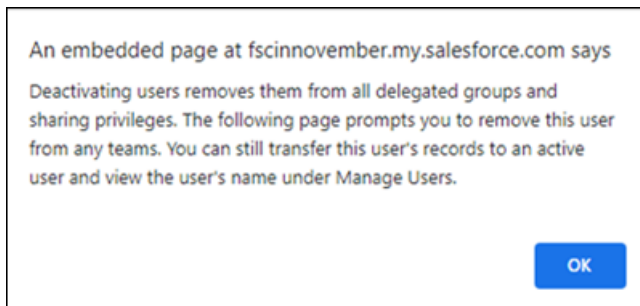
SEE ALSO:

[Salesforce Help: Edit Object Permissions in Profiles](#)

Deactivate a Financial Services Cloud Compliant Data Sharing User

A user with account participant, opportunity participant, or participant group member records can't be deactivated until their associated records have been deleted. If you attempt to deactivate the user before deleting these records, you see an error message linking to one of the records that must be deleted.

1. Freeze the user.
 - a. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
 - b. Click the name of the user to deactivate.
 - c. Click **Freeze**.
 - d. Proceed to Step 2 or Step 3.
2. Manually delete account participant, opportunity participant, and participant group member records.
 - a. Click **Edit**.
 - b. Deselect **Active**. A window displays:

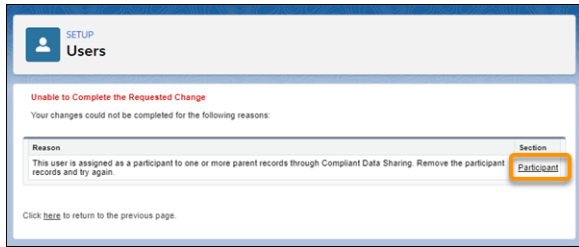


- c. Click **OK**.
- d. Click **Save**. If the user has any account or opportunity participant records, an error displays a link to one of the participant records.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



- e. Click **Participant**.
- f. On the Account Participant or Opportunity Participant page, click **Delete**, and click **Delete** in the confirmation window to complete the deletion.
- g. Repeat step 2 until all records are deleted and changes save without error.

3. Remove the account participant, opportunity participant, and participant group records associated with the user.

- a. Copy the Salesforce ID of the user to be deactivated.
- b. In workbench use the following SOQL Query to find all account participant records for the user, replacing `User's Salesforce ID` with the ID you copied in step 3a:

```
SELECT Id FROM AccountParticipant WHERE ParticipantId = 'User's Salesforce ID'
```

- c. In workbench, in SOQL Query, export the results as a CSV file.
- d. In workbench, in Delete, select **From File**, specify the exported CSV file, and click **Next**.
- e. The exported CSV file contains only the Id Field that maps to the Id Field in Salesforce. Click **Map Fields**.
- f. For a large volume of records, select **Process records asynchronously via Bulk API**.
- g. Click **Confirm Delete**. The resulting page shows a list of records that were deleted.
- h. To delete the user's opportunity participant records, repeat steps 3c through 3g with the following SOQL query, replacing `User's Salesforce ID` with the ID you copied in step 3a.

```
SELECT Id FROM OpportunityParticipant WHERE ParticipantId = 'User's Salesforce ID'
```

- i. To delete the user's participant group member records, repeat steps 3c through 3g with the following SOQL query, replacing `User's Salesforce ID` with the ID you copied in step 3a:

```
SELECT GroupId,Id,SystemModstamp,UserOrGroupId FROM GroupMember WHERE UserOrGroupId = 'User's Salesforce ID' AND Group.Type='Participant'
```

4. Deactivate the user.

- a. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
- b. Click the name of the user to deactivate.
- c. Click **Edit**.
- d. Deselect **Active**.
- e. In the window that opens, click **OK**.

- f. Save your changes.


SEE ALSO:

[Knowledge Article: Find the Salesforce ID for a User or profile](#)

[forceworkbench wiki: Home](#)

Manage Participant Groups in Compliant Data Sharing

Compliant Data Sharing uses participant groups to define groups of users who play the same role in their record interactions.

-  **Note:** A user who belongs to a participant group can't be deactivated. Remove them from all participant groups before deactivating them.

[Add Participant Groups for Compliant Data Sharing](#)

Create participant groups to share a record with a group of users without having to create individual participant records for each team member.

[Add Members to Participant Groups in Compliant Data Sharing](#)

Add users or participant groups to a participant group when they play the same role in record interactions.

[Review and Edit Participant Groups in Compliant Data Sharing](#)

View, change, and delete participant groups from the Participant Groups page in Setup.

EDITIONS


Financial Services Cloud is available in Lightning Experience.


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

Add Participant Groups for Compliant Data Sharing

Create participant groups to share a record with a group of users without having to create individual participant records for each team member.

Create a participant group and then add members to it.

-  **Note:** A user must have the Use Compliant Data Sharing permission to be a member of a participant group.

-  **Note:** A user who belongs to a participant group can't be deactivated. Remove them from all participant groups before deactivating them.


1. Create a participant group.
 - a. From Setup, in the Quick Find box, enter *Participant*, and then select **Participant Groups**.
 - b. On the Participant Groups Setup page, click **New**.
 - c. Enter a name, such as *Support Team*.
 - d. Enter a developer name or use the system default.
 - e. Click **Save**.
2. Add members to the participant group.
 - a. On the Participant Groups setup page for the group you created, click **Add Member**.
 - b. To add a user, select **People** from the dropdown list.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- c. To add a participant group, select **Group** from the dropdown list.
- d. Enter the name of the user or participant group to add, and select it from the dropdown list.


 **Note:** If you select a user who doesn't have the Use Compliant Data Sharing permission, you receive an error when you click **Save**.


- a. Click **Save**.

Assign the participant group as a participant on a record.


Add Members to Participant Groups in Compliant Data Sharing

Add users or participant groups to a participant group when they play the same role in record interactions.

 **Note:** A user must have the Use Compliant Data Sharing permission to be a member of a participant group.

 **Note:** A user who belongs to a participant group can't be deactivated. Remove them from all participant groups before deactivating them.

1. From Setup, in the Quick Find box, enter *Participant*, and then select **Participant Groups**.
2. On the Participant Groups setup page, select the desired group.
3. On the Participant Groups setup page for the group you created, click **Add Member**.
4. To add a user, select **People** from the dropdown list.

 **Note:** If you select a user who doesn't have the Use Compliant Data Sharing permission, you receive an error when you click **Save**.

5. To add a participant group, select **Group** from the dropdown list.
6. Enter the name of the user or participant group to add, and select it from the dropdown list.
7. Click **Save**.

Assign the participant group as a participant on a record.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Review and Edit Participant Groups in Compliant Data Sharing

View, change, and delete participant groups from the Participant Groups page in Setup.

Manage your participant groups by removing group members, changing the group name, or deleting a group.

1. From Setup, in the Quick Find box, enter *Participant*, and then select **Participant Groups**.
2. On the Participant Groups setup page, select the desired group.
3. To remove a group member, select **Delete** from the dropdown list for that member.
4. To change the name of the group, click **Rename Group**.
 - a. Enter a new name for the participant group.
 - b. Update the developer name or use the existing developer name.

 **Note:** The developer name isn't automatically updated when the participant group name is changed.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

c. Click **Save**.

5. To delete a participant group, click **Delete Group**.

View Record Access Levels for Compliant Data Sharing Users

To see users who have access to a record, use the Sharing button on the record's detail page.

The Sharing Detail page in Salesforce Classic shows users with access to a record, their level of access, and the reason they have access. The share table entries for Compliant Data Sharing show a sharing reason of Compliant Data Sharing.



Note: You must be an administrator or the record owner to see the **Sharing** button on a record's detail page.



Note: Non-owner users only have sharing table records when their assigned level of access exceeds that granted by default in your org.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

SEE ALSO:

[Financial Services Cloud User Guide: View Users with Compliant Data Sharing Record Access](#)

[Salesforce Help: Viewing Which Users Have Access to Your Records in Salesforce Classic](#)

[Salesforce Help: Viewing Which Users Have Access to Your Records in Lightning Experience](#)

Considerations and Limitations for Compliant Data Sharing

Here are some things to keep in mind when you implement Compliant Data Sharing (CDS).

General

A maximum of 10 participant roles can be active for each parent object.

A maximum of 20 record participants can be added to each parent record. For example, only 20 account participants can be added to an account record.

A user can't be deactivated if they're a record participant or if they're a member of a participant group. Delete a user's participant records and participant group member records before deactivating.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Share Tables

The Compliant Data Sharing feature creates and updates object sharing table entries based on a user's assigned participant role and the access level for that role. The sharing table entries created by this feature have a new sharing reason called Compliant Data Sharing.

Enforcement of account and opportunity data access for other features like reports and list views are unaffected by Compliant Data Sharing. All other data sharing features continue to work as usual.

If there are multiple share table entries for the same user, the one with the least restrictive access level is enforced.

Share table entries are created only if the participant role access level is less restrictive than the org-wide sharing default for the object. If the org-wide default changes to a less restrictive level than the participant role's level, the participant's corresponding share table entries are automatically deleted.

SEE ALSO:

[Developer Documentation: Sharing Rows](#)

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:

[Salesforce Help: Enable Action Plans](#)

EDITIONS

Action Plans is available in Lightning Experience and included in Salesforce Government Cloud with Lightning Scheduler, Financial Services Cloud, Public Sector Solutions, and Consumer Goods Cloud.

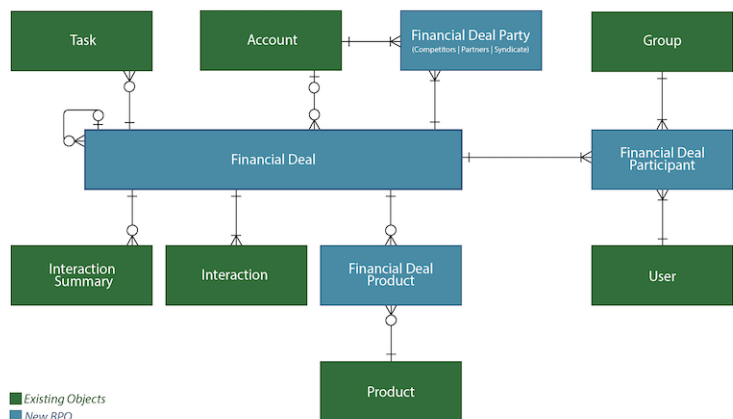
Available in: **Developer**, **Enterprise**, and **Unlimited** editions.

Track and Manage a Financial Deal Lifecycle

Help deal teams effectively track a financial deal lifecycle with the new Financial Deal Management data model. They can manage every aspect of deal-related interactions and take advantage of compliant, role-based data sharing options. They can create new financial deal records to specify the deal stage, the status of the deal, the probability of the deal being successfully closed, and more. They can share deal records that contain confidential information only with relevant stakeholders to maintain compliance.

EDITIONS

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



Enable Financial Deals

To enable the financial deal management feature in your Salesforce org, enable the Deal Management setting.

Configure Sharing Settings for Financial Deals

Give your users access to financial deals 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 Financial Deal object. 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 financial deals for all users that are below them in the role hierarchy. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in the hierarchy, disable the Role-Hierarchy-Based Sharing for Deal Management setting. This action disables the Grant Access Using Hierarchies option for the Financial Deal object. To configure advanced, compliant data sharing rules for financial deals, enable compliant data sharing for the Financial Deal object.

Work with Financial Deals

When creating a financial deal, deal teams can take detailed meeting notes, specify the confidentiality level of the deal, the status of the deal, the probability of the deal being successfully closed, and more. They can share notes that contain confidential information only with relevant stakeholders to maintain compliance.

Enable Financial Deals

To enable the financial deal management feature in your Salesforce org, enable the Deal Management setting.

1. Enable the Deal Management setting.
 - a. From Setup, in the Quick Find box, enter *Deal Management*, and then select **Deal Management Settings**.
 - b. Enable **Deal Management**.

EDITIONS

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

Configure Sharing Settings for Financial Deals

Give your users access to financial deals 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 Financial Deal object. 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 financial deals for all users that are below them in the role hierarchy. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in the hierarchy, disable the Role-Hierarchy-Based Sharing for Deal Management setting. This action disables the Grant Access Using Hierarchies option for the Financial Deal object. To configure advanced, compliant data sharing rules for financial deals, enable compliant data sharing for the Financial Deal object.

1. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in a role hierarchy, disable the Role-Hierarchy-Based Sharing for Deal Management setting.
 - a. From Setup, in the Quick Find box, enter *Deal Management*, and then select **Deal Management Settings**.
 - b. Disable **Role-Hierarchy-Based Sharing for Financial Deals**.



Note: This setting is available only if the Deal Management setting is enabled.

2. Enable compliant data sharing for the Financial Deal object.

EDITIONS

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

- a. From Setup, in the Quick Find box, enter *Compliant Data Sharing*, and then select **Object Enablement Settings**.
- b. Enable **Financial Deal**.

Work with Financial Deals

When creating a financial deal, deal teams can take detailed meeting notes, specify the confidentiality level of the deal, the status of the deal, the probability of the deal being successfully closed, and more. They can share notes that contain confidential information only with relevant stakeholders to maintain compliance.

[Create a Financial Deal](#)

Capture details of a financial deal in a financial deal record. When creating a financial deal, the deal teams can specify details such as confidentiality level of the deal, the deal status, the stage of the deal, expected close date, and close probability. You can also capture notes and next steps by creating interaction summaries linked with interactions in the context of a deal.

[Share a Financial Deal](#)

Give users access to existing financial deals. There are two ways to share financial deal record. You can share a record from the Financial Deal Participants related list or by using the Manage Participants component.

EDITIONS

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

Create a Financial Deal

Capture details of a financial deal in a financial deal record. When creating a financial deal, the deal teams can specify details such as confidentiality level of the deal, the deal status, the stage of the deal, expected close date, and close probability. You can also capture notes and next steps by creating interaction summaries linked with interactions in the context of a deal.

1. From the App Launcher, select **Financial Deals**.
2. Change the list view to **All Financial Deals**.
3. Click **New**.
4. Enter a name for the financial deal.
5. Specify the other details, such as deal type, stage, confidentiality, status, expected close date, and close probability.
6. Save your changes.

EDITIONS

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

Share a Financial Deal

Give users access to existing financial deals. There are two ways to share financial deal record. You can share a record from the Financial Deal Participants related list or by using the Manage Participants component.

[Share a Financial Deal from the Financial Deal Participants Related List](#)

Give users access to a record without writing complex code. You can share a financial deal record with a user or a group by adding them as participants to the record from the Financial Deal Participants related list. With this approach, you can share a record with only one user or a group at a time.

Share a Financial Deal Using the Manage Participants Component

Help deal teams easily share financial deals with multiple participants at a time in a compliant manner. When you add the Manage Participant component to a financial deal record page, deal teams can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

Share a Financial Deal from the Financial Deal Participants Related List

Give users access to a record without writing complex code. You can share a financial deal record with a user or a group by adding them as participants to the record from the Financial Deal Participants related list. With this approach, you can share a record with only one user or a group at a time.

Ensure that compliant data sharing is enabled for the Financial Deal object.

1. On a financial deal record page, on the Financial Deal 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 financial deal 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.

Share a Financial Deal Using the Manage Participants Component

Help deal teams easily share financial deals with multiple participants at a time in a compliant manner. When you add the Manage Participant component to a financial deal record page, deal teams can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

Ensure that compliant data sharing is enabled for the Financial Deal object.

1. Add the Manage Participants component to the financial deal record page.
 - a. On the financial deal record page, click the Setup icon, and select **Edit Page**.
 - b. Drag the Manage Participants component to the page layout.
 - c. Save your changes.
2. Configure the suggestions list.
 - a. On the financial deal record page, click the Setup icon, and select **Edit Page**.
 - b. Click anywhere on the Manage Participants component to select it.
 - c. In the properties pane, under Participant Types for Suggestion List, click **Select**.
 - d. Move the required participant types to the Selected list and click **OK**.
 - e. Save your changes.
3. Add users or groups as participants.
 - a. On a financial deal record page, on the Manage Participants component, click **Add**.
 - b. Search for users or groups or select them from the Suggested Users or Groups section to add them as participants to the record.
 - c. Click **Next**.

EDITIONS

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

- d. Select a participant role for every user or group, enter comments, and select **Active**.
- e. Click **Finish**.
- f. Save your changes.

Document Tracking and Approvals

A document type defines commonly required documentation for completing a business process. Create a document checklist item for each file required from a customer. A customer or user then uploads a relevant file for the document checklist item, and the files are tracked through an approval process. Customers upload new versions of rejected documents and track the progress of their uploaded documentation from submission to approval.



Note: Approval Processes and Communities aren't supported in **Professional** Edition.

[Enable Document Tracking and Approvals](#)

Set up document tracking and approvals in your Financial Services Cloud organization.

[Work with Document Tracking and Approvals](#)

Lending applications, insurance coverage, and other businesses often require specific types of documentation from customers. Create document checklist items for commonly required documents.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable Document Tracking and Approvals

Set up document tracking and approvals in your Financial Services Cloud organization.

[Assign the Document Checklist Permission Set](#)

Use the Document Checklist permission sets to give your users access to document checklist items.

[Update Opportunity and Account Page Layouts](#)

Add the Document Checklist Items component to the related list section on Opportunity and Account page layouts.

[Set Up Document Types](#)

Define common required document types to associate a new document checklist item with a document type. You can also use document types for filtering in reporting.

[Allow Borrowers Access to Document Checklist Items in Communities](#)

Empower your customers by providing them access to document checklist items through communities.

[Update User Profiles](#)

Add the relevant permissions for the Document Checklist Item standard object to your existing user profiles.

[Create and Assign User Profiles](#)

Create and assign profiles with access to document checklist items to your users.

[Create an Approval Process](#)

Create an approval process for the Document Checklist Item object.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Change Item Deletion Settings](#)

Change the **Checklist Items with Attachments** setting to let document checklist items be deleted, even if files have been uploaded for them. By default, you can't delete a document checklist item after a file has been uploaded.

Assign the Document Checklist Permission Set

Use the Document Checklist permission sets to give your users access to document checklist items.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. On the Permission Sets Setup page, click **Document Checklist**.
3. Click **Manage Assignments** and then click **Add Assignments**.
4. Select the users who need access to document checklist items, click **Assign**, and click **Done**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Update Opportunity and Account Page Layouts

Add the Document Checklist Items component to the related list section on Opportunity and Account page layouts.

1. From Setup, open **Object Manager**.
2. Enter *Opportunity*, then click **Opportunity**.
3. Click **Page Layouts** and then select the layout that your document checklist items users see.
4. On the palette, select **Related Lists**.
5. Drag **Document Checklist Items** from the palette to the Related Lists section and click **Save**. If you're prompted to overwrite user's related list customizations, click **Yes**.
6. From Setup, open **Object Manager**.
7. Click **Account**.
8. Click **Page Layouts** and then select the layout that your document checklist items users see.
9. On the palette, select **Related Lists**.
10. Drag **Document Checklist Items** from the palette to the Related Lists section and click **Save**. If you're prompted to overwrite user's related list customizations, click **Yes**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Set Up Document Types

Define common required document types to associate a new document checklist item with a document type. You can also use document types for filtering in reporting.

Creating document types is optional.

1. From Setup, in the Quick Find box, enter *Document Type*, then select **Document Type**.
2. Click **New Document Type**.
3. On the New Document Type screen, enter a label and an API name.
4. To add another document type, click **Save & New** or to finish, click **Save**.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Allow Borrowers Access to Document Checklist Items in Communities

Empower your customers by providing them access to document checklist items through communities.

-  **Note:** Ensure that communities are enabled for your org.
-  **Note:** Communities aren't supported in **Professional** Edition.

[Create Community User Profile](#)

Create a customer community plus profile with access to document checklist items.

[Assign a Profile to a Community](#)

Assign a customer community plus user profile with read access to document checklist item to the community where your customers upload associated files.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create Community User Profile

Create a customer community plus profile with access to document checklist items.

Ensure that communities are enabled for your org.

1. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
2. On the Profiles page, click **Clone** next to the Customer Community Login User, the Customer Community Plus Login User, the Customer Community Plus User, or the Customer Community User profile.
3. Enter a name for the cloned profile and save.
4. On the Profile Edit page, click **Edit**.
5. Under Standard Object Permissions, enable read access for Document Checklist Items and click **Save**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Assign a Profile to a Community

Assign a customer community plus user profile with read access to document checklist item to the community where your customers upload associated files.

Ensure that communities are enabled and you have at least one community created for your org.

1. From Setup, in the Quick Find box, enter *Communities*, then select **All Communities**.
2. Click **Workspaces** next to the community you want to assign a user profile to.
3. Click the **Administration** tile.
4. Click **Members** in the left pane.
5. Under Select Profiles, select **Customer** in the search drop-down list. Enter the name of the customer community plus user profile with document checklist item access that you created and click **Find**.
6. Under Available Profiles, select the profile you created with document checklist item read access, click **Add**, and save.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Assign the profile you added to Selected Profiles to community users who need access to document checklist items.

SEE ALSO:

[Setting Up a Community](#)

Update User Profiles

Add the relevant permissions for the Document Checklist Item standard object to your existing user profiles.

1. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
2. On the Profiles page, click **Edit** next to the profile you want to add document checklist item access to.
3. On the Profile Edit page, under Standard Object Permissions, select the necessary permissions and save.



Example: You have existing profiles for loan officer and compliance officer. Edit the loan officer profile and select read, edit, create, and delete basic access so that those users are able to fully support their customers. Edit the compliance officer profile and select read so that those users are able to view records relevant to their jobs.

SEE ALSO:

[Create and Assign User Profiles](#)

[Object Permissions](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create and Assign User Profiles

Create and assign profiles with access to document checklist items to your users.

If you have existing profiles for the users that need access to document checklist items, follow these instructions for each of them.

1. From Setup, in the Quick Find box, enter *Profiles*, then select **Profiles**.
2. On the Profiles page, click **Clone** next to the profile you want to add document checklist item access to.
3. Enter a name for the cloned profile and save.
4. On the Profile Edit page, click **Edit**.
5. Under Standard Object Permissions, select the necessary permissions for Document Checklist Items and click **Save**.
6. From Setup, select **User > User**.
7. Click **Edit** next to the user that you want to assign the new profile to.
8. On the User Edit page, select the new profile from the Profile drop-down list and click **Save**.



Example: You create a loan officer profile based on the standard user and select read, edit, create, and delete basic access. That access gives loan officers the ability to support their customers. You then create a compliance officer profile based on the standard

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

user and select read. That access allows compliance officers to view records relevant to their jobs, but blocks them from modifying records.

SEE ALSO:

[Update User Profiles](#)

[Object Permissions](#)

Create an Approval Process

Create an approval process for the Document Checklist Item object.



Note: Approval Processes aren't supported in **Professional** Edition.

Drive your approval process using the standard Status field or a custom field. Approvers for a document checklist item can be account teams, custom fields on the document checklist item, queues, or custom groups.

SEE ALSO:

[Approvals](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Change Item Deletion Settings

Change the **Checklist Items with Attachments** setting to let document checklist items be deleted, even if files have been uploaded for them. By default, you can't delete a document checklist item after a file has been uploaded.

1. From Setup, in the Quick Find box, enter *Document*, then select **Document Checklist Settings**.
2. On the Document Checklist Settings screen, click the **Checklist Items with Attachments** button. When the value is set to **On**, it allows document checklist items to be deleted even when related files have been uploaded. (The uploaded files are not deleted).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Work with Document Tracking and Approvals

Lending applications, insurance coverage, and other businesses often require specific types of documentation from customers. Create document checklist items for commonly required documents.

[Create a Document Checklist Item](#)

To encourage your customers to provide required documents, create document checklist items that help manage file uploads and approvals.

[Upload a File to a Document Checklist Item](#)

Upload a required document to its associated document checklist item.

[Upload a New Version of a Document Checklist Item File](#)

If you must change the file associated with a document checklist item, upload a new version.

[Upload File to Document Checklist Item in Communities](#)

Upload a required document to its associated document checklist item through a community portal.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Upload a New Version of a Document Checklist Item File in Communities](#)

If you must change the file associated with a document checklist item, upload a new version through a community portal.

Create a Document Checklist Item

To encourage your customers to provide required documents, create document checklist items that help manage file uploads and approvals.

You can create document checklist items for any of the following records:

- Account
- Opportunity
- Residential Loan Application

You can also relate document checklist items to Action Plan Templates, and generate similar checklist items when Action Plans are created from those templates.

For example, to create a document checklist item for an opportunity:

1. Open the opportunity that you want to create a document checklist item for.
2. Under **Related**, click the dropdown list to the right of **Document Checklist Items**, and select **New**.
3. Enter a name for the required document.
4. If your company uses document types, select the appropriate document type.
5. (Optional) Under **File Pertains To**, specify the contact or user that the associated file relates to.



Note: The **File Pertains To** field was previously required, but it becomes optional with the Winter '21 release.

6. To create another document checklist item, click **Save & New**, or to finish, click **Save**.



Note: If the opportunity was associated with an account or a residential loan application, then the document checklist item is automatically associated to those records as well. If an opportunity's account or residential loan application are updated, the associations between them and the document checklist item don't update automatically.

SEE ALSO:

[Work with Action Plans](#)

Upload a File to a Document Checklist Item

Upload a required document to its associated document checklist item.

Upload a file to a document checklist item from its associated opportunity or account records.

1. Open the account or opportunity with the document checklist item you want to upload a file to.
2. Under **Document Checklist Items**, click the arrow to the right of the document checklist item you want to upload a file to and select **Upload File**.
3. Select the file to upload and click **Open**.

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Upload a New Version of a Document Checklist Item File


If you must change the file associated with a document checklist item, upload a new version.

Upload a new version of a file that's associated with a document checklist item from its parent opportunity or account records.

1. Open the account or opportunity with the document checklist item you want to upload the new file version to.
2. Under **Document Checklist Items**, click the arrow to the right of the document checklist item you want to upload a file to and select **Upload New Version**.

 **Note:** If **Upload New Version** doesn't appear in the drop-down list, refresh your screen.

3. Select the file to upload and click **Open**.
4. If desired, enter what's changed between the old version of the file and the new version, and click **Upload**.

 **Note:** When you upload a new file version to a document checklist item, only the contents of the document checklist item change, not the file details.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Upload File to Document Checklist Item in Communities

Upload a required document to its associated document checklist item through a community portal.

1. Click your profile picture and select **My Account**.
2. Under **Document Checklist Items**, click the arrow to the right of the document checklist item you want to upload a file to and select **Upload File**.
3. Select the file to upload and click **Open**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Upload a New Version of a Document Checklist Item File in Communities

If you must change the file associated with a document checklist item, upload a new version through a community portal.

1. Click your profile picture and select **My Account**.
2. Under **Document Checklist Items**, click the arrow to the right of the document checklist item you want to upload a file to and select **Upload New Version**.

 **Note:** If **Upload New Version** doesn't appear in the drop-down list, refresh your screen.

3. Select the file to upload and click **Open**.
4. If desired, enter what's changed between the old version of the file and the new version, and click **Upload**.

 **Note:** When you upload a new file version to a document checklist item, only the contents of the document checklist item change, not the file details.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Life Events and Business Milestones

With the Life Events or Business Milestones component, get an at-a-glance view of your customers' life events or business milestones. Use the details to identify upcoming opportunities and devise timely personalized offers and engagement. The Life Events or Business Milestones component shows life events for a person account or contact record and business milestones for an account record.

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

EDITIONS

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

Add the Life Events or Business Milestones Component to a Record Page

To make the list of life events or business milestones available on a record page, add the Person Life Events or Business Milestones related list to the corresponding page layout. Then, add the Life Events or Business Milestones component to a person account, account, or contact record page.


Work with Life Events and Business Milestones

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.

Add the Life Events or Business Milestones Component to a Record Page

To make the list of life events or business milestones available on a record page, add the Person Life Events or Business Milestones related list to the corresponding page layout. Then, add the Life Events or Business Milestones component to a person account, account, or contact record page.

1. Add the Business Milestones related list to the Account page layout. Add the Person Life Events related list to the Person Account and Contact page layouts.
 - a. From Setup, open **Object Manager**.
 - b. In the Quick Find box, enter *Account*, and then select **Account**.
 - c. Click **Page Layouts**, and then select the relevant page layout.
 - d. On the palette, select **Related Lists**.
 - e. Drag **Business Milestones** from the palette to the Related Lists section on the page and click **Save**. If you're prompted to overwrite user's related list customizations, click **Yes**.
 - f. Similarly, add the Person Life Events related list to the relevant page layouts for Person Account and Contact objects.

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

2. Add the Life Events or Business Milestones component to a person account, account, or contact record page.
 - a. On the record page you want to add the component to, from Setup, select **Edit Page**.
 - b. Drag the Life Events or Business Milestones component to the page.
 - c. Save your changes.

EDITIONS

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

Work with Life Events and Business Milestones

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.

EDITIONS

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

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.

Use Custom Icons for Event and Milestone Types

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

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**.

EDITIONS

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


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.

EDITIONS

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

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.

EDITIONS

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


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**.

EDITIONS

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

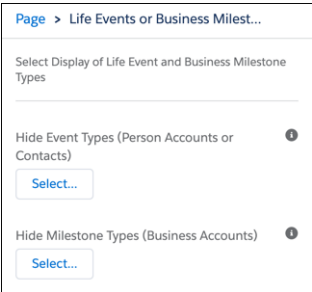
 **Tip:** Put the object’s Name field first to provide users context when they hover over a life event or business milestone.

- 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.

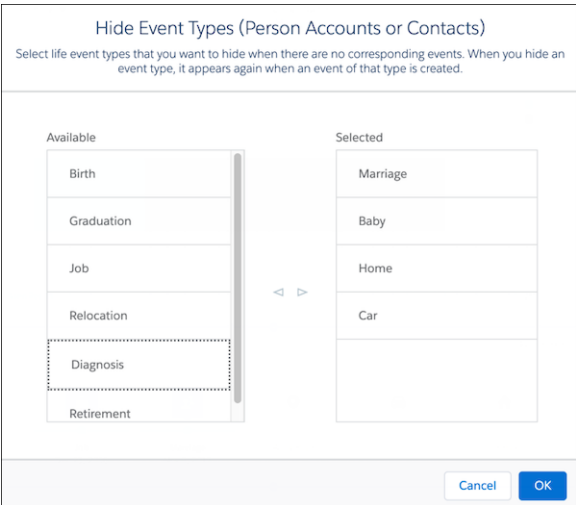
Hide Sensitive Life Event Types and Business Milestone Types

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 a 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, business account, or contact), 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**.



EDITIONS

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

5. Save your changes.

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.

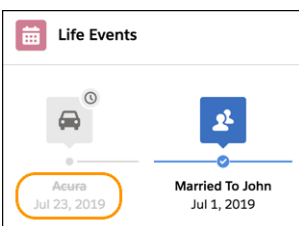
EDITIONS

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

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.




EDITIONS

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

Use Custom Icons for Event and Milestone Types

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

1. From Setup, in the Quick Find box, enter *Icons*, and then select **Icons**.
2. 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.

EDITIONS

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[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.

[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.

Components That Track Intelligent Need-Based Referrals and Scoring

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

SEE ALSO:

[Einstein Referral Scoring for Financial Services Cloud](#)

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:

[Report and Dashboard Limits, Limitations, Allocations, and Technical Requirements](#)

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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**.
3. Select **Create New Approval Process | Use Jump Start Wizard**.
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.
10. Click **View Approval Process Detail Page**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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:

[Process Builder](#)

[Create a Process with Process Builder](#)


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Enable the Expressed Interests Component](#)

If you haven't made modifications to the unmanaged extension package, uninstall and reinstall it. No additional setup steps are required to enable the Expressed Interests component. If you have made modifications to unmanaged extension package, follow these setup steps.

Enable the Expressed Interests Component

If you haven't made modifications to the unmanaged extension package, uninstall and reinstall it. No additional setup steps are required to enable the Expressed Interests component. If you have made modifications to unmanaged extension package, follow these setup steps.

[Add the Expressed Interests Component to Account Lightning Pages](#)

Add the Expressed Interests Component to Account page layouts to make it available to users.

[Create a Field Set for the Expressed Interests Component](#)

Create the FSC Referrals Expressed Interest field set to use with the Expressed Interest Component.

[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.

Add the Expressed Interests Component to Account Lightning Pages

Add the Expressed Interests Component to Account page layouts to make it available to users.

1. Update an Account Lightning page.
 - a. In Lightning App Builder, select a page layout, such as **Banking Individual Page - Two Column**.
 - b. Select the **Referrals** tab.
 - c. Drag the **Referrals Expressed Interest List - Financial Services Cloud** component onto the page layout. 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create a Field Set for the Expressed Interests Component

Create the FSC Referrals Expressed Interest field set to use with the Expressed Interest Component.

1. From Setup, open **Object Manager** and click **Lead and Referral**.
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 **Where is this used?**, provide a description: *Client profile's Referrals tab*.
6. Save your changes.
7. Drag the following fields from the object palette to the **In the Field Set** container: **Name**, **Expressed Interest**, **Potential Value**, **Lead Status**, and **Last Modified Date**.
8. Click **Save** on the object palette.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

1. Create a permission set that grants edit access to the Related Account field on the Lead object.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
 - b. Click **New**.
 - c. Enter a label, API name, and description for your permission set and click **Save**.
 - d. In the Find Settings box, enter *Leads*, and select Leads under Object Settings.
 - e. Click **Edit**.
 - f. Under Field Permissions, enable edit access for Related Account and click **Save**.
2. Assign the permission set to users.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then click **Permission Sets**.
 - b. Click the permission set that you created that grants edit access to the Related Account field on the Lead object.
 - c. Click **Manage Assignments**, and then click **Add Assignments**.
 - d. Select the checkbox for each user you want to assign the permission set to, and then click **Assign**.

 **Note:** You can only assign a permission set to active users.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Rollups in Financial Services Cloud

Financial Services Cloud supports client- and group-level record rollups and rollup by lookup (RBL) rules. .

Record Rollups

Record rollups aggregate information from related records for a number of objects in Financial Services Cloud at a client- or group-level. Client-level records are aggregated by default; no setup is required. Enable group-level rollups to aggregate related records for all primary group members.

Rollup By Lookup Rules

Rollup By Lookup (RBL) rules aggregate your data at a high level. When you edit a financial account record or primary group membership, the RBL configuration updates the corresponding RBL client- and group-level summaries.

Record Rollups, Rollups By Lookup, and Data Loads

Control record rollups and rollups by lookup to maximize data load performance.

Record Rollups

Record rollups aggregate information from related records for a number of objects in Financial Services Cloud at a client- or group-level. Client-level records are aggregated by default; no setup is required. Enable group-level rollups to aggregate related records for all primary group members.

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.



Important: Don't change the Household__c field. Any change to this field can cause inconsistent group-level rollups.

Group-level rollups are supported for all primary members.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Table 17: Objects That Support Group-Level Rollups

Object	Where to View	Type
Financial Account	Financial Account List, Financial Account Role, Bank Account, Investment Account, Insurance Policy	Component
Financial Goals	Financial Goal	Component
Assets and Liabilities	Assets and Liabilities	Component
Referrals	Referrals Expressed Interest List, Referrals Made List	Component
Events	Activities	Related List
Tasks	Activities	Related List
Opportunities	Household Opportunities	Related List
Case	Household Cases	Related List
Claim	Household Claims	Related List
Claim Participant	Household Claim Participants	Related List
Insurance Policy	Household Insurance Policies	Related List
Insurance Policy Participant	Household Insurance Policy Participants	Related List

[Enable Group Record Rollups](#)

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, the rolled up records are displayed at the group level on the corresponding components or related lists.

[Extra Steps to Enable Rollups for Opportunities, Policies, Claims, and Referrals](#)

Not all objects are set up for group-level rollups by default. If you don't see related lists for insurance-related objects, cases, opportunities, or referrals, add picklist values to the Rollup__c field on the Account Contact Relationship object.

[Define Rollup Settings for Objects](#)

Experience faster record rollups at the household level when performing rollups in batches. Use the new Record Rollup Configuration custom setting to configure various rollup settings for each object individually. For example, you can define a batch size to limit the number of records in each batch. When you run the batch job to roll up records, these settings help improve the performance of the batch job.

[Optimize Record Rollup Performance](#)

Use Optimize Record Rollups to optimize record rollup performance.

[Optimize Record Rollup Triggers in Financial Services Cloud](#)

Use optimized code to improve Before Insert and Before Update record rollup trigger performance.

[Record Rollup Batch Jobs](#)

Record rollups populate the household on the records that are associated with members of a household. You can perform record rollups in real time (through triggers) or in batches using batch jobs.

SEE ALSO:

[What Is a Group?](#)

Enable Group Record Rollups

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, the rolled up records are displayed at the group level on the corresponding components or related lists.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Extra Steps to Enable Rollups for Opportunities, Policies, Claims, and Referrals

Not all objects are set up for group-level rollups by default. If you don't see related lists for insurance-related objects, cases, opportunities, or referrals, add picklist values to the Rollup__c field on the Account Contact Relationship object.

In new orgs with Insurance for Financial Services Cloud, the Rollup__c field on the Account Contact Relationship object includes the insurance-related picklist values. However, if you're configuring Insurance for Financial Services Cloud in an existing org, perform these steps to add the picklist values.

To show all Primary Group member cases on a related list at the group level, add Cases as a picklist value to the Rollup__c field on Account Contact Relationship.

To show all Primary Group member opportunities on a related list at the group level, add Opportunities as a picklist value to the Rollup__c field on Account Contact Relationship.

To show all Primary Group member referrals on a related list at the group level, add Referrals as a picklist value to the Rollup__c field on Account Contact Relationship.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter *Account Contact Relationship*, and then select **Account Contact Relationship**.
3. Click **Fields & Relationships**, and then select **Roll-Ups**.
4. Under Values, click **New**.
5. In the Roll-Ups field, enter these picklist values. Enter each value on its own line.
 - Cases
 - Claims
 - Claim Participants
 - Insurance Policies
 - Insurance Policy Participants
 - Opportunities
 - Referrals
6. Save your changes.

Define Rollup Settings for Objects

Experience faster record rollups at the household level when performing rollups in batches. Use the new Record Rollup Configuration custom setting to configure various rollup settings for each object individually. For example, you can define a batch size to limit the number of records in each batch. When you run the batch job to roll up records, these settings help improve the performance of the batch job.

1. From Setup, in the Quick Find box, enter *Custom Settings*, and then select **Custom Settings**.
2. Click **Manage** next to Record Rollup Configuration.
3. Click **New** to add an object and define rollup settings for the object.
Repeat this step to add the objects that you want to define these settings for.
4. Save your changes.

SEE ALSO:

[Optimize Record Rollup Performance](#)

[Record Rollup Batch Jobs](#)

Optimize Record Rollup Performance

Use Optimize Record Rollups to optimize record rollup performance.

1. From Setup, in the Quick Find box, enter *General Settings*, and then select **General Settings** under **Financial Services**.
2. Enable Record Rollup Optimization.

SEE ALSO:

[Record Rollup Batch Jobs](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Optimize Record Rollup Triggers in Financial Services Cloud

Use optimized code to improve Before Insert and Before Update record rollup trigger performance.

1. From Setup, in the Quick Find box, enter *Metadata*, and then select **Custom Metadata Types**.
2. On the Custom Metadata Types Setup page, click **Manage Records** next to Use Standard Trigger.
3. On the Standard Triggers page, click the name of the trigger to update.
4. Click **Edit**, and select **Active**.
5. Click **Save**.

EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

Record Rollup Batch Jobs

Record rollups populate the household on the records that are associated with members of a household. You can perform record rollups in real time (through triggers) or in batches using batch jobs.

To enable record rollup processing through triggers, enable the Enable Group Record Rollups setting. To perform record rollups in batches, use the GroupAssignmentBatchable batch job.

 **Important:** If you have enabled the Record Rollup Optimization (Beta) setting, use the new HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

Only one of the two batch jobs, GroupAssignmentBatchable or HouseholdAssignmentBatchable, can be used in an org. GroupAssignmentBatchable is enabled by default in orgs. To use the HouseholdAssignmentBatchable job, enable the Record Rollup Optimization (Beta) setting.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[The GroupAssignmentBatchable Job](#)

Run the GroupAssignmentBatchable job to perform group record rollups in batches. If you defined rollup settings for objects (using the Record Rollup Configuration custom setting), you can use the new RecordRollupConfig method to run the GroupAssignmentBatchable job. The RecordRollupConfig method lets you perform group record rollups for one or more objects at a time.

[The HouseholdAssignmentBatchable Job](#)

If you enabled the new Record Rollup Optimization (Beta) setting, use the new HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

SEE ALSO:

[Enable Group Record Rollups](#)

[Define Rollup Settings for Objects](#)

The GroupAssignmentBatchable Job

Run the GroupAssignmentBatchable job to perform group record rollups in batches. If you defined rollup settings for objects (using the Record Rollup Configuration custom setting), you can use the new RecordRollupConfig method to run the GroupAssignmentBatchable job. The RecordRollupConfig method lets you perform group record rollups for one or more objects at a time.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

For All Objects, With Rollup Settings

To run the job for all objects with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
Database.executeBatch(new FinServ.GroupAssignmentBatchable());
```

For One or More Objects, Overriding the Rollup Settings

To run the job for one or more objects, overriding the custom rollup settings, you must construct new instances of the FinServ.GroupAssignmentBatchable.RecordRollupConfig class and pass them to

FinServ.GroupAssignmentBatchable.runRecordRollupJob(List<FinServ.GroupAssignmentBatchable.RecordRollupConfig> recordRollupConfigs).

FinServ.GroupAssignmentBatchable.RecordRollupConfig provides two constructors.

```
//startTime, endTime, and scope can be set to null.
//When set to null value, the values are read from the custom setting.

//Constructor 1:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime)

//Constructor 2:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime, Integer scope)
```

Sample code

```
FinServ.GroupAssignmentBatchable.RecordRollupConfig recordRollupConfigFinancialAccount =
new FinServ.GroupAssignmentBatchable.RecordRollupConfig('FinancialAccount__c',
DateTime.newInstance(2009, 3, 4, 21, 2, 2), null, 500);
FinServ.GroupAssignmentBatchable.RecordRollupConfig recordRollupConfigCase = new
FinServ.GroupAssignmentBatchable.RecordRollupConfig('Case', null, null, null);

List<FinServ.GroupAssignmentBatchable.RecordRollupConfig> recordRollupConfigs = new
List<FinServ.GroupAssignmentBatchable.RecordRollupConfig>{recordRollupConfigFinancialAccount,
recordRollupConfigCase};

FinServ.GroupAssignmentBatchable.runRecordRollupJob(recordRollupConfigs);
```

The HouseholdAssignmentBatchable Job

If you enabled the new Record Rollup Optimization (Beta) setting, use the new HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

For a Single Object, With Rollup Settings

To run the job for a single object with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
FinServ.HouseholdAssignmentBatchable.runJob('Task');
```

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

For Multiple Objects, With Rollup Settings

To run the job for multiple objects sequentially with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
FinServ.HouseholdAssignmentBatchable.runJob(new List<String> {'FinancialAccount__c', 'Task'});
```

For One or More Objects, Overriding the Rollup Settings

To run the job for one or more objects, overriding the custom rollup settings, you must construct new instances of the FinServ.HouseholdAssignmentBatchable.RecordRollupConfig class and pass them to FinServ.HouseholdAssignmentBatchable.runJob(List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig> recordRollupConfigs). FinServ.HouseholdAssignmentBatchable.RecordRollupConfig provides two constructors.

```
//startTime, endTime can be set to null.
//When set to null, the filter is not applied when querying the object.

//Constructor 1:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime)

//Constructor 2:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime, Integer scope)
```

Sample code

```
FinServ.HouseholdAssignmentBatchable.RecordRollupConfig recordRollupConfigFinancialAccount
    = new FinServ.HouseholdAssignmentBatchable.RecordRollupConfig('FinancialAccount__c',
    DateTime.newInstance(2009, 3, 4, 21, 2, 2), null, 500);
FinServ.HouseholdAssignmentBatchable.RecordRollupConfig recordRollupConfigCase = new
    FinServ.HouseholdAssignmentBatchable.RecordRollupConfig('Case', null, null);

List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig> recordRollupConfigs = new
    List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig>{recordRollupConfigFinancialAccount,
    recordRollupConfigCase};

FinServ.HouseholdAssignmentBatchable.runJob(recordRollupConfigs);
```


To run the jobs concurrently for multiple objects, you can call `FinServ.HouseholdAssignmentBatchable.runJob()` multiple times. Here's an example.

```
FinServ.HouseholdAssignmentBatchable.runJob('Task');
FinServ.HouseholdAssignmentBatchable.runJob('Claim');
```

Rollup By Lookup Rules

Rollup By Lookup (RBL) rules aggregate your data at a high level. When you edit a financial account record or primary group membership, the RBL configuration updates the corresponding RBL client- and group-level summaries.

RBL rules are available only for Assets and Liabilities, Claims, Financial Accounts, Financial Account Roles, Insurance Policies, and Revenues objects.



Warning: We don't recommend or provide support for creation or customization of Financial Services Cloud RBL rules.

[Rollup By Lookup Configuration and Criteria Fields](#)

Use Rollup By Lookup Configuration and Rollup By Lookup Criteria fields to control when RBL rules are triggered.

[Packaged Rollup By Lookup Configurations](#)

Financial Services Cloud supports these packaged RBL configurations.

[Enable Rollup By Lookup Rules](#)

Enable RBL rules for client- and group-level rollups.

[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 Tableau CRM 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.

Rollup By Lookup Configuration and Criteria Fields

Use Rollup By Lookup Configuration and Rollup By Lookup Criteria fields to control when RBL rules are triggered.

Changes in records don't always trigger active RBLs rules. Three general conditions are evaluated.

1. Are the **Enable Group Record Rollups** and **Enable Rollup Summary** Wealth Management Config custom settings selected for the user who made the change?
2. Is the record type ID for the affected record included in the RBL?
3. If there's a Where Clause, does it evaluate to true?


When all three conditions are true, either the appropriate RBL rules are triggered to run or an Apex job that will trigger the appropriate rules is queued.

RBL rules are made up of two Financial Services Cloud objects: Rollup By Lookup Configuration and Rollup By Lookup Filter Criteria. Rollup By Lookup Configurations define rules for calculating rollup fields. Rollup By Lookup Filter Criteria define criteria for calculating rollups.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Rollup By Lookup Configuration
RBLforAUMClientPrimaryOwner

Related
Details

Rollup By Lookup Configuration Name
RBLforAUMClientPrimaryOwner

Active
☐

Field To Roll Up From
Balance__c

From Object
FinancialAccount__c

From Record Type
InvestmentAccount

Lookup Field
PrimaryOwner__c

Rollup Operation
Sum

Field To Roll Up To
TotalAUMPrimaryOwner__c


To Object
Account

Fields Triggering Update
Managed__c, Balance__c

Where Clause ⓘ
1

Namespace
Industries

Table 18: Rollup By Lookup Configuration Fields

Name	Description	Example
Active	Indicates whether the rule is active.	When the rule is active and all conditions are true, the rule is triggered to run or will queue an Apex job.
Field to Rollup From	The field to aggregate.	RBLforAUMClientPrimaryOwner can be triggered when a change is made to either the Managed__c or the Balance__c fields on a financial account, RBLforAUMClientPrimaryOwner rolls up the Balance__c on all related financial accounts with a record type of InvestmentAccount. It does this for the primary owner, and writes the result to the TotalAUMPrimaryOwner__c field of the primary owner's account record  Note: RBLforAUMClientPrimaryOwner, RBLforAUMHH, and RBLforFARforAUMClientPrimaryOwner all roll up to the TotalAUMPrimaryOwner__c field on the Account object so activate only one of the three rules.
From Object	The source object that provides the Lookup Field and, for all objects except Financial Account Role, the Field to Rollup From. For Financial Account Role objects, the Field to Rollup From is on the financial account records related to the financial account role record.	
From Record Type	The specific source object record types to aggregate (if specified).	
Lookup Field	The type of rollup to do. Rollup types include: <ul style="list-style-type: none"> Group-level household lookup on Assets and Liabilities, Claims, 	

Name	Description	Example
	<p>Financial Accounts, and Insurance Policies objects. Lookup Field is set to Household__c.</p> <ul style="list-style-type: none"> Client-level lookup on Financial Account and Assets and Liabilities objects. Lookup Field is set to PrimaryOwner__c for the primary owner lookup and JointOwner__c for the joint owner lookup. Client-level lookup on Financial Account Role objects. Lookup Field is set to PrimaryOwner__c for the primary owner lookup and JointOwner__c for the joint owner lookups. 	
Rollup Operation	<p>Specifies the type of operation for the aggregation. Valid operations are:</p> <ul style="list-style-type: none"> Sum Max Min Avg Count 	
Field to Roll Up To	The target object field to update with the aggregated information.	
To Object	The target object for the aggregated information. All packaged RBLs update a field on the Account object.	
Fields Triggering Update	The fields on the source object that can trigger an update. When left blank, any edit on the source object can invoke a rollup recalculation.	
Where Clause	The filter criteria clause. The clause can also be a logic statement with two or more filter criteria. When left blank, any changes to the source object or the specified triggering fields can invoke a rollup recalculation.	RBLforAUMClientPrimaryOwner has one filter criteria that's defined in the A-05 rollup by lookup filter criteria record.

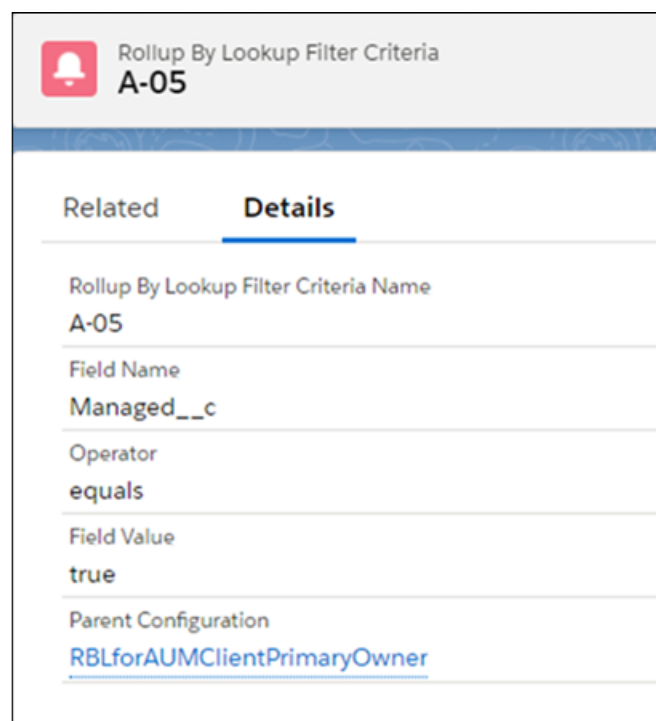
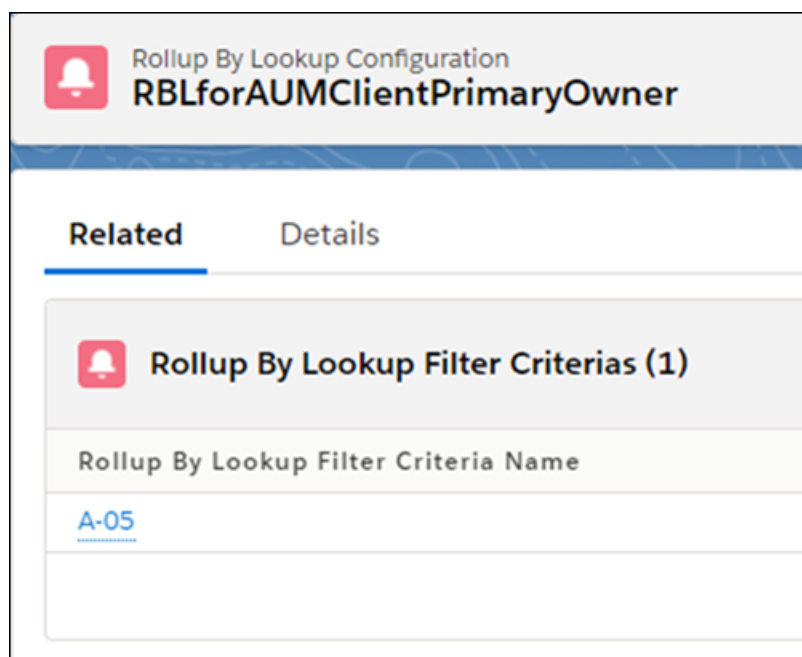


Table 19: Rollup By Lookup Filter Criteria Fields

Name	Description	Example
Field Name	The field to evaluate.	In Financial Services Cloud, the Managed__c indicates whether a financial account is managed. RBLforAUMClientPrimaryOwner can only be triggered for managed financial accounts. In this case RBLforAUMClientPrimaryOwner is only triggered when Managed__c must equals true
Operator	The operation for the criteria.	
Field Value	The value used to evaluate the criteria.	
Parent Configuration	The Rollup By Lookup Configuration that the filter criteria applies to.	

Packaged Rollup By Lookup Configurations

Financial Services Cloud supports these packaged RBL configurations.

There are three types of RBL configurations:

- **Household.** These group-level rules use the Household__c custom field on the following objects: Assets and Liabilities, Claims, Financial Accounts, and Insurance Policies. They aggregate information at the household level.
- **Financial Account.** These client-level rules use the PrimaryOwner__c and JointOwner__c custom fields on the Financial Account and Assets and Liabilities objects. They aggregate information for the primary owner and for a single joint owner.
- **Financial Account Role.** These client-level rules use the RelatedAccount__c custom field on the Financial Account Role object. They aggregate Financial Account information for the primary owner and for multiple joint owners.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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






-  **Note:** All financial account (FA) type rules have corresponding financial account role (FAR) type rules to support rollups 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:** FA, FAR, and HH types often share the Account rollup field for primary owner. For example, RBLforAUMClientPrimaryOwner (FA), RBLForFARforAUMClientPrimaryOwner (FAR), and RBLforAUMHH (HH) rules all roll up to the TotalAUMPrimaryOwner__c field on the Account object. As a result, you can activate only one of these rules at a time. Otherwise inaccurate aggregations can occur.
-  **Note:** All group or household (HH) type rules support RBL calculations for the Primary Owner's Primary Group only.
-  **Warning:** We don't recommend or provide support for creation or customization of Financial Services Cloud RBL rules.
-  **Note:** RBL rules require processing power. To optimize performance, only activate those rules that support your business needs.

Table 20: RBL Rules

Rule Description	Type	Object	Rolled Into
RBLforAUMClientJointOwner 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.	FA	Financial Account	TotalAUMJointOwner__c
RBLforAUMClientPrimaryOwner 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.	FA	Financial Account	TotalAUMPrimaryOwner__c
RBLforAUMHH Group-level aggregation of all Financial Accounts balances with Managed set to True. Denotes assets under management.	HH	Financial Account	TotalAUMPrimaryOwner__c
RBLForBankingClientJointOwner Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is Joint Owner on	FA	Financial Account	TotalBankDepositsJointOwner__c

Rule Description	Type	Object	Rolled Into
the Financial Account. One Joint Owner only.			
RBLForBankingClientPrimaryOwner 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.	FA	Financial Account	TotalBankDepositsPrimaryOwner__c
RBLForBankingHH Group-level aggregation of all Financial Account balances with record type Banking Account, Checking Account, and Savings Account.	HH	Financial Account	TotalBankDepositsPrimaryOwner__c
RBLForClaimPaidHH Group-level aggregation of total amount paid for claims raised against policies owned by the policyholder's primary household. This rollup includes the amount paid for a claim only if the associated policy is active.	HH	Claim	TotalClaimAmountPaid__c
RBLForFARforAUMClientJointOwner 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.	FAR	Financial Account Role	TotalAUMJointOwner__c
RBLForFARforAUMClientPrimaryOwner 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.	FAR	Financial Account Role	TotalAUMPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
RBLForFARForFinAcctsClientHeldJointOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalHeldFinAcctsJointOwner__c
RBLForFARForFinAcctsClientHeldPrimaryOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalHeldFinAcctsPrimaryOwner__c
RBLForFARForFinAcctsClientJointOwner Client-level aggregation of all Financial Accounts balances where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalFinAcctsJointOwner__c
RBLForFARForFinAcctsClientPrimaryOwner Client-level aggregation of all Financial Accounts balances where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalFinAcctsPrimaryOwner__c
RBLForFARForInsuranceClientJointOwner 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.	FAR	Financial Account Role	TotalInsuranceJointOwner__c
RBLForFARForInsuranceClientPrimaryOwner Client-level aggregation of all Financial Accounts with record	FAR	Financial Account Role	TotalInsurancePrimaryOwner__c

Rule Description	Type	Object	Rolled Into
type Insurance Policy where Client is designated as the Primary Owner on Financial Account Role.			
RBLForFARForInsurancePremium 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.	FAR	Financial Account Role	TotalPremium__c
RBLForFARForInvestmentsClientJointOwner 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.	FAR	Financial Account Role	TotalInvestmentsJointOwner__c
RBLForFARForInvestmentsClientPrimaryOwner 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.	FAR	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForFARForLastTransactionDateHH Group-level summary of the Last Transaction Date for all associated Financial Accounts.	HH	Financial Account Role	LastTransactionDatePrimaryOwner__c
RBLForFARForLastTransactionDateJointOwner Client-level summary of the Last Transaction Date for all associated Financial Accounts where Client is designated as a Joint Owner on Financial	FAR	Financial Account Role	LastTransactionDateJointOwner__c

Rule Description	Type	Object	Rolled Into
Account Role. Multiple Joint Owners supported.			
RLForFARLastTransactionDatePrimaryOwner Client-level summary of the Last Transaction Date for all associated Financial Accounts where Client is designated as a Primary Owner on Financial Account Role.	FAR	Financial Account Role	LastTransactionDatePrimaryOwner__c
RLForFARTotalBankDepositsJointOwner 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.	FAR	Financial Account Role	TotalBankDepositsJointOwner__c
RLForFARTotalBankDepositsPrimaryOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalBankDepositsPrimaryOwner__c
RLForFARTotalNumberOfAccountsJointOwner 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.	FAR	Financial Account Role	TotalNumberOfAccountsJointOwner__c
RLForFARTotalNumberOfAccountsPrimaryOwner Client-level summary of the number of all associated Financial Accounts where Client is designated as a Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalNumberOfAccountsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
RBLForFA>TotalOutstandingCreditJointOwner 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.	FAR	Financial Account Role	TotalOutstandingCreditJointOwner__c
RBLForFA>TotalOutstandingCreditPrimaryOwner 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.	FAR	Financial Account Role	TotalOutstandingCreditPrimaryOwner__c
RBLForFinAcctsClientHeldJointOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalHeldFinAcctsJointOwner__c
RBLForFinAcctsClientHeldPrimaryOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalHeldFinAcctsPrimaryOwner__c
RBLForFinAcctsClientJointOwner Client-level aggregation of all Financial Account balances where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalFinAcctsJointOwner__c
RBLForFinAcctsClientPrimaryOwner	FA	Financial Account	TotalFinAcctsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
Client-level aggregation of all Financial Account balances where Client is Primary Owner on the Financial Account.			
RBLForFinAcctsHHHeld Group-level aggregation of all Financial Accounts balances with Held Away set to False.	HH	Financial Account	TotalHeldFinAcctsPrimaryOwner__c
RBLForFinAcctsHHTotal Group-level aggregation of all Financial Account balances.	HH	Financial Account	TotalFinAcctsPrimaryOwner__c
RBLForGWPHH Group-level aggregation of total premium for active policies owned by the policyholder's primary household.	HH	Insurance Policy	TotalHouseholdPremiums__c
RBLForInsuranceClientJointOwner 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.	FA	Financial Account	TotalInsuranceJointOwner__c
RBLForInsuranceClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalInsurancePrimaryOwner__c
RBLForInsuranceHH Group-level aggregation insurance amounts for all Financial Accounts with record type Insurance Policy.	HH	Financial Account	TotalInsurancePrimaryOwner__c
RBLForInsurancePremiumHH Group-level aggregation premiums of all Financial	HH	Financial Account	TotalPremium__c

Rule Description	Type	Object	Rolled Into
Accounts with record type of Insurance Policy.			
RBLForInvestmentsClientJointOwner 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.	FA	Financial Account	TotalInvestmentsJointOwner__c
RBLForInvestmentsClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForInvestmentsHH Group-level aggregation of all Financial Account balances with record type Investment Account.	HH	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForLiabilitiesClientJointOwner Client-level summary of all non-financial liabilities where Client is Joint Owner.	--	Assets and Liabilities	TotalLiabilitiesJointOwner__c
RBLForLiabilitiesClientPrimaryOwner Client-level summary of all non-financial liabilities where Client is Primary Owner.	--	Assets and Liabilities	TotalLiabilitiesPrimaryOwner__c
RBLForLiabilitiesHH Client-level summary of all non-financial liabilities where Client is Primary Owner.	HH	Assets and Liabilities	TotalLiabilitiesPrimaryOwner__c
RBLForNonfinAssetsClientJointOwner Client-level summary of all non-financial assets where Client is Joint Owner.	--	Assets and Liabilities	TotalNonfinancialAssetsJointOwner__c
RBLForNonfinAssetsClientPrimaryOwner	--	Assets and Liabilities	TotalNonfinancialAssetsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
Client-level summary of all non-financial assets where Client is Primary Owner.			
RBLForNonfinAssetsHH Group-level summary of all non-financial assets.	HH	Assets and Liabilities	TotalNonfinancialAssetsPrimaryOwner__c
RBLForTotalNumberClaimHH Group-level summary of the number of claims raised against policies owned by the policyholder's primary household. This rollup includes a claim only if the associated policy is active.	HH	Claim	ClaimsOnHouseholdPolicies__c
RBLForTotalNumberOfAccountsBankerHH Group-level summary of the number of all associated Financial Accounts.	HH	Financial Account	TotalNumberOfAccountsPrimaryOwner__c
RBLForTotalNumberPoliciesHH Group-level summary of the number of active policies owned by the policyholder's primary household.	HH	Insurance Policy	HouseholdPolicies__c
RBLForTotalOutstandingCreditBankerHH Group-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, or AutoLoan.	HH	Financial Account	TotalOutstandingCreditPrimaryOwner__c
RBLForTotalRevenueBanker Client-level summary of all Revenues.	--	Revenue	TotalRevenue__c

Enable Rollup By Lookup Rules

Enable RBL rules for client- and group-level rollups.

1. From Setup, in the Quick Find box, enter *Custom Settings*, and then select **Custom Settings**.
2. Click **Manage** next to Wealth Application Config.
3. Click **Edit**.
4. Select **Enable Group Record Rollups** and **Enable Rollup Summary**.
5. Save your changes.
6. Activate the RLB rules that you want to use.



Note: RBL rules aren't supported for Insurance Policy Participants and Claim Participants.

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 Tableau CRM 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.

[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.

[Convert RBL Rules into Data Processing Engine Definitions](#)

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

[Manage Data Processing Engine Definitions](#)

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

[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.

[Best Practices for Faster Processing](#)

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

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.

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

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.

1. From Setup, in the Quick Find box, enter *Financial Services*, and then select **General Settings**.
2. 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Manage Data Processing Engine Definitions

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

[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.

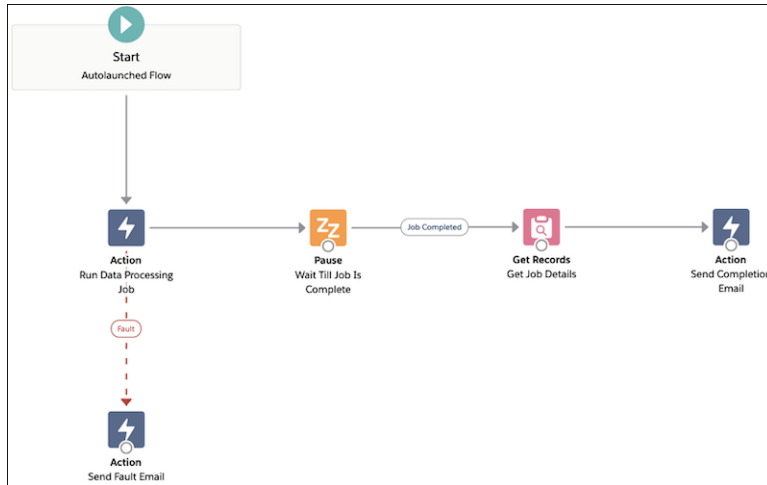
SEE ALSO:

[Salesforce Help: Monitor Your Data Processing Engine Definitions](#)

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.

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>();

```

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


```
myMap.put('v1', 'String');
rblFlow = new Flow.Interview.Data_Processing_Flow(myMap);
rblFlow.start();
}
}
}
```

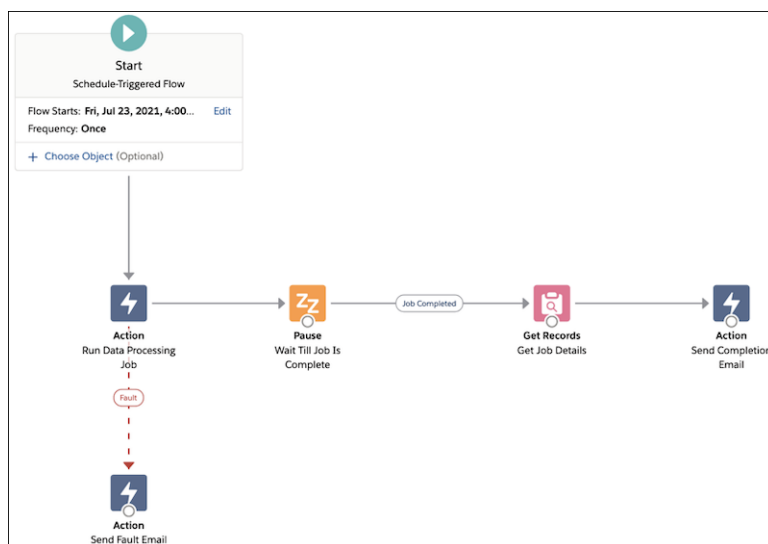
SEE ALSO:

[Salesforce Help: Run a Data Processing Engine Definition](#)

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.

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.

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The flow runs according to the set schedule.

SEE ALSO:

[Salesforce Help: Run a Data Processing Engine Definition](#)

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":"0mdx00000000U1AAI","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.

- 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Rollup by Lookup Examples](#)

Real-world examples of using the Rollup by Lookup (RBL) framework in Financial Services Cloud to perform high-volume and complex calculations.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud](#)

[Salesforce Help: Data Processing Engine Best Practices](#)

Rollup by Lookup Examples

Real-world examples of using the Rollup by Lookup (RBL) framework in Financial Services Cloud to perform high-volume and complex calculations.

Switch to the enhanced RBL framework to use the superior processing power of Tableau CRM 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. The Data Processing Engine gives you greater flexibility when defining or modifying RBL rules.

The RBL framework is highly scalable, configurable, and helps deliver better performance. It enables you to:

- Create your own rules based on both standard and custom objects.
- Group rules to increase efficiency.

Two RBL framework walkthroughs guide you with step-by-step instructions to execute the RBL rules.

[Calculate Total Household Portfolio Value](#)

Here's a step-by-step guide to roll up the financial account balances for each household. This example considers all the accounts that are part of the household and all the financial accounts that belong to each account in the rollup operation.

[Group Rules to Optimize the Calculations](#)

Step-by-step guide to group rules and optimize the rollup of cash balances of all financial accounts to the household.

Calculate Total Household Portfolio Value

Here's a step-by-step guide to roll up the financial account balances for each household. This example considers all the accounts that are part of the household and all the financial accounts that belong to each account in the rollup operation.

- The Rollup by Lookup (RBL) framework is available and enabled.

For more information, see [Enable the RBL Using Data Processing Engine Framework](#) on page 210.

- Familiarity with data transformation operations such as joins and appends.
- Familiarity with adding formulas to RBL rules.

Let's say that a Bank A has a large set of customers modeled as Person Accounts and that these customers have one or more Financial Accounts. Also, these customers form a part of their households, which are Accounts.

The requirement is to roll up the financial account balances for each household by including:

- All the accounts that are part of the household
- All the financial accounts that belong to each account

To calculate the total household portfolio value, you can create a DPE definition to aggregate the financial accounts of a household using the household__c field and display the sum on the household record."

The DPE plan to achieve the requirement:

1. Create two data sources with the source objects as Accounts and Financial Accounts.
2. Filter the results of the Accounts data source to consider only the RecordType, IndustriesHousehold.
3. Create an aggregate on Financial Accounts.
 - a. Groupby the household id field.
 - b. Sum the balance field.
4. Create a left outer join to join the results of steps 2 and 3.
5. Writeback with the results of step 4 to the Accounts data source.



Note: The field names that you come across in this example may vary in the org that you are trying to execute the DPE definition. For example they maybe appended with a namespace.

1. Create a data processing engine definition.
 - a. From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**.
 - b. Click **New**.
 - c. Enter the name of the definition as *Total Household Portfolio Value*.
 - d. Click **Create**.
2. Create a data source (Accounts) and select its objects and fields.
 - a. On the Data Processing Engine definition page, click **New Data Source**.
 - b. Enter the name as *Account and Recordtype*.
 - c. Save your changes.
 - d. From the Source Object dropdown list, search for and select **Account**.
 - e. Click **Select Fields**.
 - f. Select the fields **Id** and **Balance__c**.



Note: Balance__c is a custom field in the Accounts object to which we will roll up the financial account balance value of each household.

- g. Enter the alias name for **Id** as *AccountId* and for **Balance__c** as *AccountBalance*.
 - h. Click **Done**.
3. Select the related objects and fields for the Account and Recordtype data source.
 - a. Click **Add Related Object**.
 - b. Select the **RecordType** object.
 - c. Click **Select Fields**.
 - d. Select the **DeveloperName** and **Id** fields.
 - e. Enter the alias name for **Id** as *RecordTypeId* and for **DeveloperName** as *DeveloperName*.
 - f. Click **Done**.
 - g. Save your changes.
4. Create a data source (Financial Account) and select its objects and fields.
 - a. On the Data Processing Engine definition page, click **New Data Source**.

- b. Enter the name as *Financial Accounts*.
 - c. Save your work.
 - d. From the Source Object list, search for and select **Financial Account**.
 - e. Click **Select Fields**.
 - f. Select the **Household__c** and **Balance__c** fields.
 - g. Enter the alias name for **Household__c** as *FAHouseholdId* and for **Balance__c** as *FABalance*.
 - h. Click **Done**.
 - i. Save your changes.
5. Create a new node to filter the Account and Recordtype data source.
 - a. On the Data Processing Engine definition page, click **New Node**.
 - b. In the Select Node Type dropdown list, select **Filter**.
 - c. Enter the name as *Filter Household Recordtypes*.
 - d. Click **Create**.
 - e. Configure the filter.

Configure the filter so that the result of the Filter Household Recordtypes data source is a filtered set of records with RecordType as IndustriesHousehold. Define these filter conditions.

 - Source Node: Account and Recordtype.
 - Select Records When: All Conditions are met (AND).
 - Field: DeveloperName
 - Operator: Equals
 - Type: Field
 - Value: IndustriesHousehold
 - f. Click **Done**.
 - g. Save your changes.

Here's what the filter conditions look like in the Filter Household Recordtypes data source page.

The screenshot shows the configuration page for a filter node named "Filter: Filter Household Recordtypes". On the left, a sidebar lists various node types: Nodes, Input Variables, New Node, Search Nodes..., Data Sources, Account and Recordtype, Financial Accounts, Jobs, Filters (selected), Filter Household Recordtypes, Appends, Workflow Objects, Formulas, Groups and Aggregates, and Slices. The main panel is titled "Filter: Filter Household Recordtypes" and includes a "Delete" button. It shows the "Source Node" as "Account and Recordtype" with a search icon. Below this, there is a checkbox for "Use a filter input variable". The "Filters" section is expanded, showing "Select Records When" set to "All conditions are met (AND)". A single condition is defined: Field "DeveloperName" (with a search icon), Operator "Equals", Type "Field", and Value "IndustriesHousehold". There is an "Add Condition" button below the condition. At the bottom, it states "This node is referenced by 0 nodes." with "Cancel" and "Done" buttons.

6. Create a node to aggregate the values of the FABalance fields in the Financial Accounts data source.
 - a. On the Data Processing Engine definition page, click **New Node**.
 - b. In the Select Node Type dropdown list, select **Group and Aggregate**.
 - c. Enter the name as *Aggregate FA Balances*.
 - d. Click *Create*.

e. From the Source Node list, search for and select **Financial Accounts**.

f. Click **Select Group Fields**.

g. Select the **Household__c** field.

h. Click **Add Aggregate** and define a new aggregate.

Under the Aggregate section, configure the aggregate as follows:

- Alias: Aggregation
- Function: Sum
- Aggregate Field: FABalance

i. Click **Done**.

j. Save your changes.

Here's what the aggregation definitions look like in the Aggregate FA Balances data source page.

7. Create a node to join the results of the Filter Household Recordtypes node and the Aggregate FA Balances node.

a. On the Data Processing Engine definition page, click **New Node**.

b. In the Select Node Type dropdown list, select **Join**.

c. Enter the name as *Join FA Aggregates and Household*.

d. Click *Create*.

e. Configure the join.

Define the following as join conditions.

- Join Type: Left Outer
- First Node: Filter Household Recordtypes
- Fields (first node): AccountId
- Second Node: Aggregate FA Balances
- Fields (second node): Aggregation

f. Map the join fields.

Under the Map Fields section, map fields from the first node to fields from the second node.

- Map the **Id** field from the filter to the **Household__C** field from the Financial Accounts data source.

Here's what the join conditions look like in the Join FA Aggregates and Household data source page.

8. Create a node to write back the results to the Accounts data source.
 - a. On the Data Processing Engine definition page, click **New Node**.
 - b. In the Select Node Type dropdown list, select **Writeback**.
 - c. Enter the name as *Account Writeback*.
 - d. From the Source Node list, search for and select **Join FA Aggregates and Household**.
 - e. In the Action Type dropdown list, select **Upsert**.
 - f. In the Target Object dropdown list, select **Account**.
 - g. Define the field mappings.

Under the Field Mapping section, map the Source Node fields to Target fields.

- Map the **AccountID** field from the join to the **Account ID** field in the Accounts data source.
- Map the **AggregateBalance** field from the join to the **Balance** field in the Accounts data source.

Here's what the writeback configurations look like in the Account Writeback data source page.

9. Save your changes.

You can now activate and execute the RBL rule to calculate the total household portfolio value. After you activate the rule, you can also invoke them as actions in flows to orchestrate processes.

SEE ALSO:

[Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine](#)

Group Rules to Optimize the Calculations

Step-by-step guide to group rules and optimize the rollup of cash balances of all financial accounts to the household.

- Rollup by Lookup (RBL) framework is available and enabled.

For more information, see [Enable the RBL Using Data Processing Engine Framework](#) on page 210.

- Familiarity with data transformation operations such as joins and appends.
- Familiarity with adding formulas to RBL rules.

Let's say there's a requirement to roll up cash balances of all financial accounts to the household with these two rules.

- The cash balances are stored in the cash balance field of the Financial Account object.
- The rollup value is stored in the cash balance field of the Accounts object.


You want to group these two rules in a single Data Processing Engine (DPE) definition to optimize the rollup operation.

The Data Processing Engine Design (DPE) plan to achieve the requirement:


1. Create two data sources with source objects as Accounts and Financial Accounts.
2. Filter the results of the Accounts data source to consider only the RecordType, IndustriesHousehold.
3. Aggregate the Financial Accounts with two aggregates:
 - a. Groupby the household id field and sum the balance field.
 - b. Groupby the household id field and sum the cash balance field.
4. Create a left outer join to join the results of steps 2 and 3.

This join operation results in a single table that includes the Account Id fields, the aggregate of the balance fields, and the aggregate of the cash balance fields.

5. Writeback with the results of step 4 to the Accounts data source.

 **Note:** The field names that you come across in this example may vary in the org that you are trying to execute the DPE definition. For example they maybe appended with a namespace.

1. Create a data processing engine definition.
 - a. From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**.
 - b. Click **New**.
 - c. Enter the name of the definition as *Group Total HH Portfolio Value and Calculate*.
 - d. Click **Create**.
2. Create a data source (Accounts) and select its objects and fields.
 - a. On the Data Processing Engine definition page, click **New Data Source**.
 - b. Enter the name as *Account and Recordtype*.
 - c. Save your changes.
 - d. From the Source Object dropdown list, search for and select **Account**.
 - e. Click **Select Fields**.
 - f. Select the **Id** and **Balance__c** fields.

 **Note:** Balance__c is a custom field in the Accounts object to which we will roll up the total cash balance.

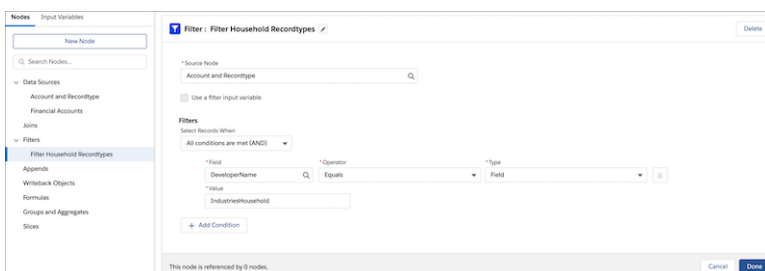
- g. Enter the alias name for **Id** as *AccountId* and for **Balance__c** as *AccountBalance*.
 - h. Click **Done**.
3. Select the related objects and fields for the Account and Recordtype data source.

- a. Click **Add Related Object**.
 - b. Select the **RecordType** object.
 - c. Click **Select Fields**.
 - d. Select the **DeveloperName** and **Id** fields.
 - e. Enter the alias name for **Id** as *RecordTypeId* and for **DeveloperName** as *DeveloperName*.
 - f. Click **Done**.
 - g. Save your changes.
4. Create a data source (Financial Account) and select its objects and fields.
 - a. On the Data Processing Engine definition page, click **New Data Source**.
 - b. Enter the name as *Financial Accounts*.
 - c. Save your work.
 - d. From the Source Object list, search for and select **Financial Account**.
 - e. Click **Select Fields**.
 - f. Select the **Household__c**, **Balance__c**, and **CashBalance__c** fields.
 - g. Enter the alias name for **Household__c** as *FAHouseholdId*, for **Balance__c** as *FABalance*, and for **CashBalance__c** as *FACashBalance*.
 - h. Click **Done**.
 - i. Save your changes.
5. Create a node to filter the Account and Recordtype data source.
 - a. On the Data Processing Engine definition page, click **New Node**.
 - b. In the Select Node Type dropdown list, select **Filter**.
 - c. Enter the name as *Filter Household Recordtypes*.
 - d. Click **Create**.
 - e. Configure the filter.

Configure the filter so that the result of the Filter Household Recordtypes data source is a filtered set of records with RecordType as IndustriesHousehold. Define these filter conditions.

 - Source Node: Account and Recordtype
 - Select Records When: All Conditions are met (AND)
 - Field: DeveloperName
 - Operator: Equals
 - Type: Field
 - Value: IndustriesHousehold
 - f. Click **Done**.
 - g. Save your changes.

Here's what the filter conditions look like in the Filter Household Recordtypes data source page.



6. Create a node to aggregate the values of the FAbalance fields in the Financial Accounts data source.

- a. In the Data Processing Engine definition page, click **New Node**.
- b. In the Select Node Type dropdown list, select **Group and Aggregate**.
- c. Enter the name as *Aggregate FA Balances*.
- d. Click **Create**.
- e. From the Source Node list, search for and select **Financial Accounts**.
- f. Click **Select Group Fields**.
- g. Select the **Household__c** field.
- h. Click **Add Aggregate** and define the first aggregate.

Under the Aggregate section, configure the aggregate as follows:

- Alias: AggregatedSum
- Function: Sum
- Aggregate Field: Balance__c

- i. Click **Add Aggregate** again and define the second aggregate.

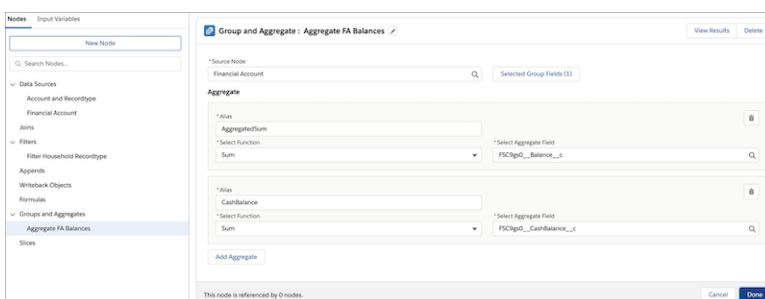
Under the Aggregate section, configure the aggregate as follows:

- Alias: CashBalance
- Function: Sum
- Aggregate Field: CashBalance__c

- j. Click **Done**.

- k. Save your changes.

Here's what the aggregation definitions look like in the Aggregate FA Balances data source page.



7. Create a node to join the results of the Filter Household Recordtypes node and the Aggregate FA Balances node.

- a. On the Data Processing Engine definition page, click **New Node**.

- b. In the Select Node Type dropdown list, select **Join**.
- c. Enter the name as *Join FA Aggregates and Household*.
- d. Click **Create**.
- e. Configure the join.

Define the following as join conditions.

- Join Type: Left Outer
- First Node: Filter Household Recordtypes
- Fields (first node): AccountId
- Second Node: Aggregate FA Balances
- Fields (second node): AggregatedSum and CashBalance

- f. Map the join fields.

Under the Map Fields section, map fields from the first node to fields from the second node.

- Map the **Id** field from filter to the **Household__C** field from the Financial Accounts data source.

Here's what the join conditions look like in the Join FA Aggregates and Household data source page.

8. Create a node to write back the results to the Accounts data source.
 - a. On the Data Processing Engine definition page, click **New Node**.
 - b. In the Select Node Type dropdown list, select **Writeback**.
 - c. Enter the name as *Account Writeback*.
 - d. From the Source Node list, search for and select **Join FA Aggregates and Household**.
 - e. In the Action Type dropdown list, select **Upsert**.
 - f. In the Target Object dropdown list, select **Account**.
 - g. Define the field mappings.

Under the Field Mapping section, map the Source Node fields to Target fields.

- Map the FAHouseholdId field to the Id field.
- Map the AggregateSum field to the Balance__c field.
- Map the CashBalance field to the Total_Primary_Cash_Value__c field.

Here's what the writeback configurations like in the Account Writeback data source page.

9. Save your changes.

You can now activate and execute the RBL rule to group rules and optimize the calculations. After you activate the rule, you can also invoke them as actions in flows to orchestrate processes.

SEE ALSO:

[Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine](#)

Record Rollups, Rollups By Lookup, and Data Loads

Control record rollups and rollups by lookup to maximize data load performance.

[Manage Rollups to Accelerate Data Loads](#)

Changes made through the user interface to a single Financial Account or Account Contact Relationship membership record trigger immediate RBL updates. Changes made via bulk operations or the Group Builder queue the updates which means that data loads more slowly when rollups and RBL are enabled. 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.

[Force Rollup By Lookup Recalculations](#)

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

Manage Rollups to Accelerate Data Loads

Changes made through the user interface to a single Financial Account or Account Contact Relationship membership record trigger immediate RBL updates. Changes made via bulk operations or the Group Builder queue the updates which means that data loads more slowly when rollups and RBL are enabled. 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.


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 **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.
6. Insert and update Financial Accounts using Data Loader.
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.

 **Note:** If you enabled the new Record Rollup Optimization (Beta) org preference, use the new **HouseholdAssignmentBatchable** batch job instead of **GroupAssignmentBatchable** to roll up records in batches.

9. Run **RunRBLBatchable**.
10. Save your changes.

Force Rollup By Lookup Recalculations

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

[Use Run Rules to Recalculate Rollups by Lookup](#)


Use Run Rules on the Rollup By Lookup Configurations tab to run recalculations.

[Recalculate Rollup By Lookup Summaries with Apex](#)


Use Apex code recalculate Rollup By Lookup summaries.

Use Run Rules to Recalculate Rollups by Lookup

Use Run Rules on the Rollup By Lookup Configurations tab to run recalculations.

 **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. From the App Launcher, find and select **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**.

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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**.


Recalculate Rollup By Lookup Summaries with Apex

Use Apex code recalculate Rollup By Lookup summaries.

 **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 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.

 **Example:** Here's sample Apex code:

```
// 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);
```

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SEE ALSO:

[Apex Developer Guide : Batch Apex](#)

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.

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**.

Configure Alerts

Client record pages in Financial Services Cloud have the Financial Account Alert component added to them, by default. To configure alerts to display on an account or financial account record page, add the component to that page.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Configure Alerts

Client record pages in Financial Services Cloud have the Financial Account Alert component added to them, by default. To configure alerts to display on an account or financial account record page, add the component to that page.

1. From Setup, in the Quick Find box, enter *App Builder*, and then select **Lightning App Builder**.
2. Click **Edit** next to the account or financial account page that you want to add the Financial Account Alert component to.
3. Drag the Financial Account Alert component to the page.
4. Save your changes and activate the page.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Individual Model Setup in Financial Services Cloud

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

[Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud](#)

Use Disable Primary Contact ID setting to remove use of the Primary Contact field in Financial Services Cloud orgs.

[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.

[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.

SEE ALSO:

[The Individual Model](#)


[Implementation Considerations for Person Accounts in Financial Services Cloud](#)


Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud

Use Disable Primary Contact ID setting to remove use of the Primary Contact field in Financial Services Cloud orgs.

Primary Contact is a custom field used in Financial Services Cloud's older individual model to connect an account and a contact record. Financial Services Cloud's newer person account model uses the Person Contact field. However, some UI components and all triggers related to the concept of a client—such as account, contact, opportunity, and lead triggers—still referenced Primary Contact. Removing these dependencies resulted in the following effects:

- Data conversion speeds for large volumes of data can be slow due to the trigger logic execution.
- Data upload speeds can slow due to Primary Contact being set in the trigger.
- System updates can be slow because Primary Contact is updated in asynchronous mode. Apex waits for the asynchronous transaction to complete before it executes any Primary Contact-based custom logic.
- Creation of records with look ups to accounts in Financial Services Cloud can be slow because the look up causes Primary Contact to refresh in an asynchronous job.

 **Important:** If any of your business logic, page layouts, or trigger code refers to PrimaryContact__c, do not use the Disable Primary Contact ID setting.

 **Important:** Disable Primary Contact ID is not intended to be turned off after it's been selected. Turning the setting off results in data inconsistencies in the PrimaryContact__c field.

1. From Setup, in the Quick Find box, enter *Custom Settings*, and then select **Custom Settings**.
2. In the Custom Settings list, click **Manage** next to Industries Settings.
3. Click **Edit** next to Disable Primary Contact ID.
4. To stop updating Primary Contact ID, select **Disable**.
5. Save your changes.


EDITIONS

Financial Services Cloud is available in Lightning Experience.


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

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**.
 - 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

ADD-ONS FOR FINANCIAL SERVICES CLOUD

Set up and manage products that you can add on to Financial Services Cloud.

To get any of these add-ons, talk to your Salesforce Account Executive.

[Financial Services Cloud Experience Cloud Sites](#)

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

[Deploy Tableau CRM for Financial Services](#)

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

[Einstein Referral Scoring for Financial Services Cloud](#)

Einstein Referral Scoring helps you determine which referrals to prioritize by predicting a score from 0 through 100 for them. Einstein Referral Scoring uses machine learning.

[Lightning Scheduler](#)

With Lightning Scheduler, you can provide personalized experiences to your customers or prospects by precision-scheduling appointments—in person or by phone or video—with the right person at the right place and time. You can easily embed appointment scheduling into standard Salesforce workflows, such as leads and referrals, opportunities, and accounts.

[Support Intelligent Document Automation](#)

Simplify the document management process, reduce manual data entry, and get customer-submitted information such as W2 forms, tax returns, or other financial documents faster using the Intelligent Form Reader.

[Intelligent Form Reader](#)

Intelligent Form Reader provides optical character recognition to automatically extract data from financial documents. You specify the data's source form, then map the fields in the form to the equivalent fields in Salesforce. Use the extracted information to create or update record fields or to verify existing data. For example, check a birthdate in Salesforce against the birthdate in a scanned passport.

[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.

[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.

[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.


EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

Financial Services Cloud Experience Cloud Sites

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

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

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

Configure a partner site, a customer site, or both, depending on your users' needs.

If you configure a single site and provide access to partner and customer site users, create page variations for each user profile. Members of this site use the same URL, but partner and customer users see different home pages, each tailored with the Financial Services Cloud components relevant to their needs.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Configure a Partner Experience Cloud Site](#)

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 Experience Cloud site with Experience Builder so that independent advisors can access Financial Services Cloud information.

[Create a Self-Service Financial Services Client Portal](#)

Work with a Financial Services Client Portal Experience Builder template to create a self-guided loan application and financial account experience for your customers. Perform initial setup and branding, configure components, and then deploy a working portal to your sandbox in about 30 minutes.

[Create an Advisor Partner Site 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 Experience Cloud site.

[Set Up a Customer Experience Cloud Site](#)

Empower customers with Financial Services Cloud Experience Cloud sites.

[Configure a Customer Experience Cloud Site](#)

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 Experience Cloud site users. You can then create custom pages for your site with Experience Builder, so that site users can access Financial Services Cloud information.

[Create a Customer Community User Profile](#)

Create a profile for site users by cloning a community user profile. This cloned profile becomes the baseline that grants site 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 site users need to access Financial Services Cloud.

[Create a Customer User](#)

Create a customer user and assign the required permissions to enable access to Financial Services Cloud in Experience Cloud customer sites.

Configure a Partner Experience Cloud Site

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 Experience Cloud site with Experience Builder so that independent advisors can access Financial Services Cloud information.

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

 **Note:** Partner Community profiles are used in Experience Cloud sites.

1. From Setup, enter *Digital Experiences* in the Quick Find box, then select **All Sites**.
2. Next to your site name, click **Workspaces**.
3. From Experience 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 Experience Cloud user license:
 - **Advisor Partner Community**
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**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

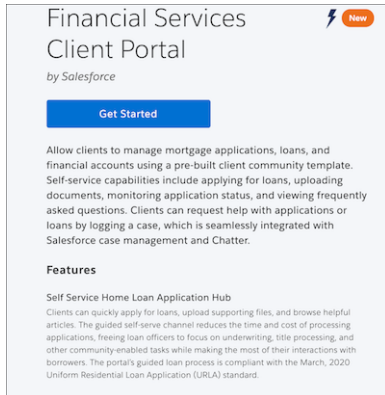
Create a Self-Service Financial Services Client Portal

Work with a Financial Services Client Portal Experience Builder template to create a self-guided loan application and financial account experience for your customers. Perform initial setup and branding, configure components, and then deploy a working portal to your sandbox in about 30 minutes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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



From the Financial Services Client Portal site template, configure prebuilt flow components that allow customers to:

- Start a loan application and upload required documents.
- Display application summaries and drill down to update records
- Browse articles and FAQs to guide their journey and use Chatter to contact their relationship manager or loan officer.
- Launch a self-service flow to request help, including a forbearance modification, for any loan application, bank account, or generic customer issue.

Customers can launch any of these flows from the portal home page.



Note: The Financial Services Client Portal follows standard Experience Workspaces conventions:

- Use Experience Builder to configure, brand, and otherwise customize the Home page and the prebuilt flow components.
- Optionally use Flow Builder to modify the flows.
- Use Content Management and Moderation to set up the Knowledge Base.
- Take advantage of prebuilt analytics using Dashboards.

[FSC Portal Experience Cloud Site Setup Checklist](#)

The Financial Services Client Portal Experience Builder template is anchored by a home page that provides flow components. The prebuilt components wrap each flow and allow customers to launch the flow. Use this checklist as a guide to perform Experience Cloud site setup tasks, to brand the home page and flows, and to update component properties.

[Work with the FSC Portal Home Page](#)

The Financial Services Client Portal home page and tiles are ready to brand and personalize for your Experience Cloud site.

[Experience Builder Components Provided in Financial Services Cloud](#)

Work with Experience Builder to configure the existing components and optionally add components to pages. The prebuilt components wrap flows that customers use to start or modify a loan application, upload supporting documents, browse FAQs and other Salesforce knowledge features, or request help.

FSC Portal Experience Cloud Site Setup Checklist

The Financial Services Client Portal Experience Builder template is anchored by a home page that provides flow components. The prebuilt components wrap each flow and allow customers to launch the flow. Use this checklist as a guide to perform Experience Cloud site setup tasks, to brand the home page and flows, and to update component properties.

Before You Begin

Gather your branding assets

- ☐ High-resolution image of your company logo
- ☐ Color scheme (or an image to upload to automatically generate one)
- ☐ Image to use as a compact header
- ☐ Thumbnail images (385x385 pixels), if you're using [Featured Topics](#) in Salesforce Knowledge.

Configure the internal Salesforce org

- ☐ Create a domain for the Financial Services Client Portal. To setup the domain, see [Enable Digital Experiences](#).

Choose a unique URL that works for your business, because you can't change it after it's been set.

- ☐ Obtain a license for and enable Salesforce Knowledge.

Launch the Financial Services Client Portal Template

- ☐ Under All Sites, click **New** and select **Financial Services Client Portal**.
- ☐ On the Financial Services Client Portal page, click **Get Started**.
- ☐ On the Enter a Name page, enter a name for your portal and click **Create**. If you're creating multiple sites, differentiate the beginning of the site name. Site are truncated in the global header dropdown menu. Users can see up to 32 characters of the name, and names include the status. Make sure that the visible part of the name allows users to distinguish between multiple sites.
- ☐ Enter a URL for your site and click **Create**. This name is appended to the domain that you created when you [enabled digital experiences](#) for this org. For example, if your site domain name is `UniversalTelco.my.site.com` and you're creating a customer site, you can enter `customers` to create the unique URL `UniversalTelco.my.site.com/customers`.
- ☐ [Specify object-level permissions](#). For example, add Read access to Accounts, Contacts, Cases, Documents, Problems, and Goals.

Create site users

- ☐ [Create users](#). When you create site users manually, assign a community user profile to them and clear the `Salesforce 1` checkbox.
- ☐ Set Shared Settings to Public Read Only. In Setup for your site, enter Shared Settings and in the Organization-Wide Defaults table make sure that the User object is set to Public Read Only for both Default Internal Access and Default External Access.
- ☐ Update the CommunityProfileName custom setting with the value `Financial Services Client Portal - Community`. This value is the name of your site profile. From Setup, enter `Custom` in the `Quick Find` box, then select **Custom Settings**. Click `Manage` next to CommunityProfileName, and then click **New** to add the name and the value for the site.

Perform General Configuration Steps in Setup

Perform the following setup tasks from the Digital Experiences node in Setup.

- ☐ [Manage contributors](#). Create roles, as needed, for the contributors who create, edit, review, and publish your site. Assign role-based access appropriate to each contributor's purview.
- ☐ [Assign user permissions](#). Use permission sets to assign your users licenses to the mortgage feature and document checklist items and to establish borrower access to the site.
- ☐ [Assign loan officer permissions](#). Create a permission set to give loan officers access to mortgage and document checklist features.
- ☐ [Configure field level security](#). Assign security to control access to sensitive data in the site. Field permissions specify the access (view or edit) level for each field in a record.
- ☐ [Configure login preferences](#). Configure the default login, log out, password management, and self-registration options for your site.

☐ Enable Change Data Capture to receive notification of changes to mortgage records. Prompt notification of changes to financial records can help speed approval of loan applications and support a responsive customer relationship culture. In Setup for your site, enter *change data capture*, select and shuttle mortgage objects from the Available Entities to the Selected Entities panel, and click **Save**. Then [subscribe to change notifications](#).

Perform Configuration Steps in Experience Builder

☐ From Setup, enter *Digital Experiences* in the **Quick Find** box, then select **All Sites**. Click **Builder** to work with your Financial Services Portal Client site.

☐ Brand your site. Add your logo and use Experience Builder tools to efficiently apply color and style to your landing page, its menus, and component flow tiles.

☐ Edit Experience Builder pages. Remove unwanted default pages from the template and create more pages, as needed. To allow access the new pages you create, be sure to update the navigation menu.

☐ Update component properties. Review and update the properties for the Mortgage Flow Launcher, the Open Loan Application, the Section Summary View, the Loan Officer Information and any other components that you add or use.

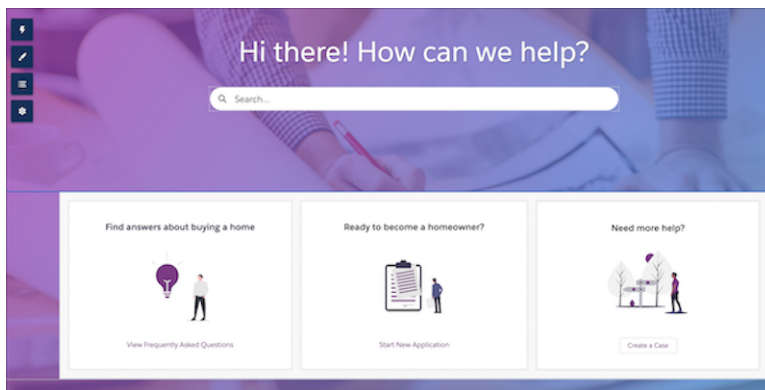
☐ [Work with CMS Workspaces](#) to author and configure Salesforce Knowledge topics. The self-guided customer journeys include Salesforce Ask a Question flow, the Create a Case flow, and searchable, sortable FAQs, discussions, and articles.

☐ [Work with Moderation Workspaces](#) to manage pre-configured moderation rules, to enable site members to flag inappropriate contributors and content, and to track and manage flagged site discussions.

☐ Preview, test, and publish your site. Look at your site in a desktop browser window and on mobile devices. When you're happy with your changes, click **Publish** in the toolbar.

Work with the FSC Portal Home Page

The Financial Services Client Portal home page and tiles are ready to brand and personalize for your Experience Cloud site.



EDITIONS

Financial Services Cloud is available in Lightning Experience.

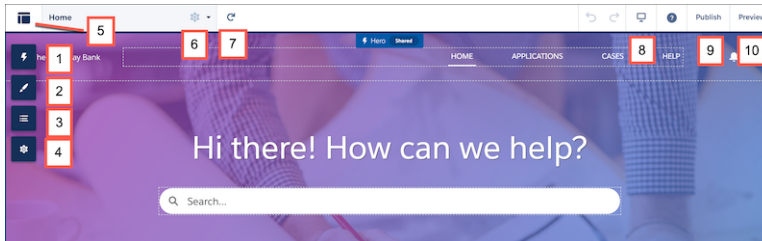
Available in: **Professional**, **Enterprise**, and **Unlimited** editions.

Using Experience Builder, you can:

- Add your own logo, colors, font, and copyright so that the Client Portal site matches your company's branding and is instantly recognizable to your site members.
- Add and apply branding sets and optionally select audiences for specific branding sets.
- Edit page menus, navigation links, and component placement.

Note: The FSC Portal components, menus, navigation, and linked pages allow thorough thematic branding and layout modification but require minimal flow configuration. The prebuilt components, navigation, and flows support self-guided loan application and financial account customer journeys.

Example: From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.



1. Drag additional Lightning components as needed onto your page. The three portal tiles contain prebuilt, self-guided flows that are customer-ready.
2. [Theme the site](#) to match your organization's brand and style. [Upload and manage branding sets](#) and optionally assign audiences to each set.
3. View all the components on the current page. To brand or change a component's properties, select the component.
4. [Edit site settings](#) and [accept updates](#) to your site's template.
5. Use the Experience menu to to:
 - Navigate to the currently live version of your site.
 - Open Experience Workspaces or Experience Management to manage site analytics, login, registration, reputation, topics, and other settings.
 - Return to **Setup**.
6. Navigate to the site page that you want to edit using the **Pages** menu and **Page Variation** menu. Customize the Hero, Header, and Footer elements and menus. [Manage, create, delete](#), and [set the visibility](#) of pages in Page Properties for each page.
7. Refresh the current page.
8. [Preview your site on different devices](#).
9. [Publish your changes](#) to make your updates available to everyone in your site.
10. [Preview the site](#) in a new browser window.

Experience Builder Components Provided in Financial Services Cloud

Work with Experience Builder to configure the existing components and optionally add components to pages. The prebuilt components wrap flows that customers use to start or modify a loan application, upload supporting documents, browse FAQs and other Salesforce knowledge features, or request help.

[Mortgage Flow Launcher](#)

The Mortgage Flow Launcher is preconfigured as a self-guided help request flow. Optionally configure it to add useful flows to Experience Builder pages.

[Open Loan Application](#)

The Open Loan Application component summarizes each non-closed application in a tile on the borrower's Profile page. Configure this component to display the Start New Application flow when the borrower has no applications in process.

Section Summary View

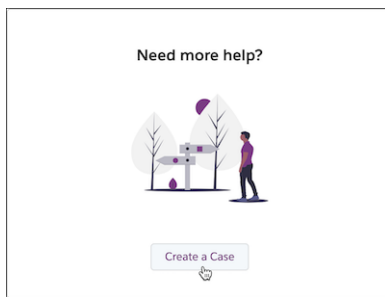
The Section Summary View component displays borrower loan information on the Summary tab of the Residential Loan Application page. The information is displayed in expandable sections that correspond to the United Residential Loan Application. Configure which sections to display and customer permissions to view, and edit loan information.

Loan Officer Information

The Loan Officer Information component displays useful contact information to customers. Optionally configure the contact information or add the tile to other Experience Builder pages.

Mortgage Flow Launcher

The Mortgage Flow Launcher is preconfigured as a self-guided help request flow. Optionally configure it to add useful flows to Experience Builder pages.



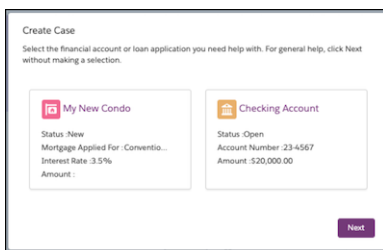
EDITIONS

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

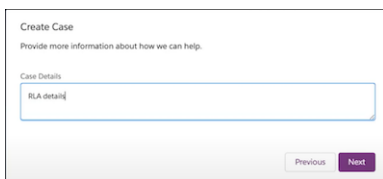
The Mortgage Flow Launcher's prebuilt Create a Case flow takes the customer through a self-guided help request journey.

- After launching the flow, the customer selects the financial account or loan application they need help with. The flow passes the record ID of the selected account or application to the next screen.

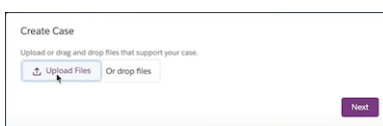


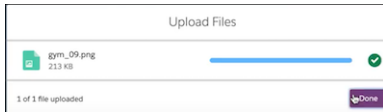
Note: If the customer has no registered accounts or loan applications, the flow skips the account selection step. The customer can then create a case that isn't linked to an account or application record ID.

- The flow prompts the customer to enter details about the help request.

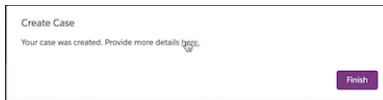


- The customer optionally uploads supporting documentation.





- The flow affirms the case is created and presents a link to the case summary page. There, customers can update case details, and use Chatter to reach a customer relationship manager or loan officer.




The underlying customer-guiding flow of the Mortgage Flow Launcher is suitable for a variety of journeys. You can quickly configure it to run other customer flows.

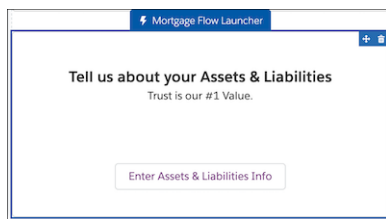
Example: Add an Assets and Liabilities Flow

From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

- In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail**.
- From the Components panel, drag the **Mortgage Flow Launcher** to an editable space on the Residential Loan Application Detail page.
- In the Flow dropdown of the Mortgage Flow Launcher panel, click **Assets and Liabilities**.

 **Note:** To see or modify the Assets and Liabilities component flow, click **Edit in Flow Builder**.

- In the **Title** field, enter the title for the repurposed tile.
- In the **Subtitle** field, enter a subtitle.
- In the **Button Label** field, enter a button label that customers click to launch the flow.
- To brand the tile, edit component properties and upload branded assets.



Example: Add a Co-Borrower Information Flow

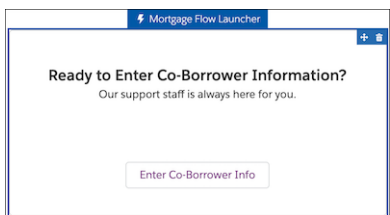
From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

- In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail**.
- From the Components panel, drag the **Mortgage Flow Launcher** to an editable space on the Residential Loan Application Detail page.
- In the Flow dropdown of the Mortgage Flow Launcher panel, click **Borrower Information**.

 **Note:** To see or modify the Borrower Information component flow, click **Edit in Flow Builder**.

- In the **Title** field, enter the title for the repurposed tile.

5. In the **Subtitle** field, enter a subtitle.
6. In the **Button Label** field, enter a button label that customers click to launch the flow.
7. To brand the tile, edit component properties and upload branded assets.



Open Loan Application

The Open Loan Application component summarizes each non-closed application in a tile on the borrower's Profile page. Configure this component to display the Start New Application flow when the borrower has no applications in process.

The Open Loan Application component displays all non-closed loan applications as tiles on the borrower's profile page. Each tile displays application details including:

- The name of the loan (hyperlinked to the Applications page).
- The amortization type.
- The amortization term in months.
- The interest rate.
- The address of the property.



It's helpful to configure the Open Loan Application component to display the Start New Application flow tile when the borrower has no open applications. Borrowers without open loan applications can then launch the new application flow from their Profile page.



Example: Configure a Start New Application Flow

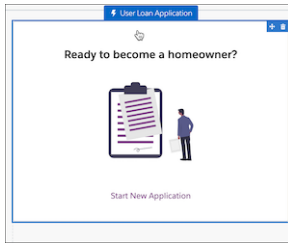
From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. Launch the Financial Services Client Portal in Experience Builder.
2. Click **Preview**.
3. From the top menu of the Pages>User menu on the Home page, click **User Profile**.
4. On the Profile page, click **Back to Builder**.
5. Hover over and click the Open Loan Application component.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

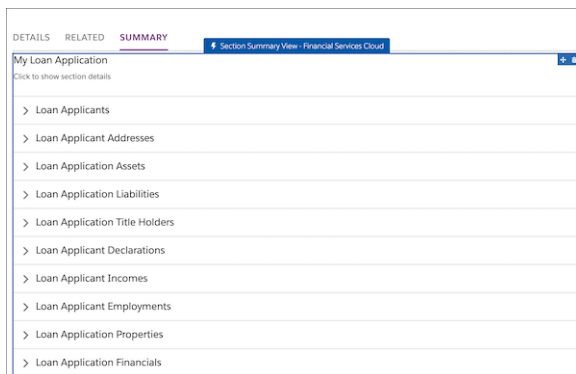
Available in: **Professional**, **Enterprise**, and **Unlimited** editions.



6. In the User Loan Application configuration panel, click the **Show Start New Application** checkbox.
This enables the Start New Application flow tile to display when the borrower has no non-closed applications.
7. Optionally enter a title in the **Open Application Title** field
8. Optionally enter a label in the **Start New Application** label field.
9. Optionally enter a label in the **Link Label** field.
The link is to the Residential Loan Application page, where borrowers can create a loan application.
10. Use the **Color**, **Image**, **Image Layout**, and **Image Position** controls to brand and customize the tile.
11. To display the Start New Application tile, click **Preview**.

Section Summary View

The Section Summary View component displays borrower loan information on the Summary tab of the Residential Loan Application page. The information is displayed in expandable sections that correspond to the United Residential Loan Application. Configure which sections to display and customer permissions to view, and edit loan information.



Borrowers interact with the portal to enter application information and upload required documents. The Summary View presents these inputs as sections that borrowers and loan officers can display and update.

Select the sections you want to display and where to display them in the Section Summary View. Set borrower and other user permissions to view or edit application details.



Example: Configure Summary Sections

From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail**.
2. On the Residential Loan Application Detail page, click the **Summary** tab.

EDITIONS

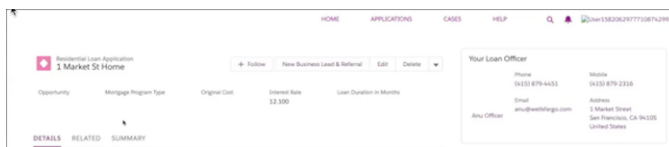
Financial Services Cloud is available in Lightning Experience.

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

3. Hover over the **Section Summary View** panel and click.
4. To configure borrower permission to read or edit summary details, click the **Mode** dropdown and choose from the selections.
5. To remove or rearrange the summary sections, click **Select**.
6. To choose which sections to display, in the Sections to Display panel, drag summary items from the **Available** column to the **Selected** column.
7. To change the order in which the Summary View tile displays summary sections, drag sections up or down in the **Selected** column.
8. Click **OK**.
9. To display your configuration, click **Preview**.

Loan Officer Information

The Loan Officer Information component displays useful contact information to customers. Optionally configure the contact information or add the tile to other Experience Builder pages.



The Loan Officer Information component displays contact information for borrowers on the Residential Loan Application Detail and Summary pages. You can relocate it on these pages, drag it to other portal pages, and configure the contact fields.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Example: Configure Contact Fields


From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. From the top menu, click **Applications**.
2. On the Applications page, click the **Loan Officer Information** tile.
3. To display the Fields to Display panel, click **Select**.
4. In the Fields to Display panel, choose contact details to display for the Loan Officer Information tile. Drag **Selected** detail boxes up and down to arrange the display of these fields. Click **OK**.



5. In the Loan Officer Information panel, optionally enter a title in the **Title** field.
6. In the Record ID field, enter the Account ID of the loan officer.

Example: Add a Loan Officer Information Tile

 **Note:** You can drag the Loan Officer Component onto other pages. Navigate to the page and click the **Components** icon to display the dropdown panel. Under **Mortgage**, drag the **Loan Office Information** component to an editable region on the page.

canvas. Then configure the component's display fields. The Components menu lists only components that are compatible with the selected page.

Create an Advisor Partner Site 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.

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.


1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Next to the Partner Community User profile or Partner Community Login User profile, click **Clone**.
The user profile is based on your community 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.

 **Note:** Community user profiles are used in Experience Cloud sites.

 **Tip:** To access permission sets, from Setup, enter *Permission Sets* in the Quick Find box, 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 Experience Cloud site.


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

 **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.

 **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 Partner User**.
- c. From the New User page, in the General Information section, select the following:
 - User License—**Partner Community**
 - Profile—**Advisor Partner Community**

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

- 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**

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

- 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**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- b. From Available Permission Sets, select **Advisor Partner Community** then click **Add**.
- c. Save your changes.

If the site is activated, an email is sent to the advisor partner user with site access information.

Next, you can configure Financial Services Cloud Lightning components in your site with Experience Builder.

SEE ALSO:

[Create Custom Pages with Experience Builder](#)

[How to Provision Salesforce Communities Users](#)

Set Up a Customer Experience Cloud Site

Empower customers with Financial Services Cloud Experience Cloud sites.

To set up a customer site, 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.



Note: Community user licenses and profiles are used in Experience Cloud sites.

Configure a Customer Experience Cloud Site

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 Experience Cloud site users. You can then create custom pages for your site with Experience Builder, so that site users can access Financial Services Cloud information.



Note: Customer Community user licenses and profiles are used in Experience Cloud sites.



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

Before you begin, make sure that you have an Experience Cloud site 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 *Digital Experiences* in Quick Find, then select **All Sites**.
2. Next to your site name, click **Workspaces**.
3. From Experience 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**.

Create a Customer Community User Profile

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

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

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 site users need to access Financial Services Cloud.

 **Note:** Community user profiles are used in Experience Cloud sites.

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 site 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 User

Create a customer user and assign the required permissions to enable access to Financial Services Cloud in Experience Cloud customer sites.

Before you can create a customer user, the owner of the contact record must have a role assigned.

 **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.

 **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

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

- 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

 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

g. Save your changes

3. Assign a permission set:


- From the contact's user page, click **Permission Set Assignments** and then click **Edit Assignments**.
- From Available Permission Sets, select **Customer Community Read Only** and then click **Add**.
- Save your changes.

If the site is activated, an email is sent to the customer user with site access information.

Next, you can configure Financial Services Cloud Lightning components in your site with Experience Builder.

Deploy Tableau CRM for Financial Services

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

 **Note:** Analytics for Financial Services is available at an extra charge for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (Analytics for Financial Services) license. It requires that you've deployed the Financial Services data model.

The Analytics for Financial Services suite provides a range of solutions, all of which enable the complete capabilities of Tableau CRM. 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 Tableau CRM to all significant data and KPIs from the Financial Services Cloud. Unique collections of dashboards—one set for advisors and personal bankers, another for managers and executives—provide everyone on the team with insights they need to grow the business.
- Predict Client Churn Risk for Wealth Management Analytics allows advisors to intelligently predict customer churn. Using the power of Einstein Discovery, the app prescribes corrective actions to help minimize occurrences of churn.
- Predict Likelihood to Add Assets for Wealth Management Analytics intelligently predicts the likelihood of advisors adding assets to accounts. Using the power of Einstein Discovery, the app prescribes actions on how to increase the chances to grow your account assets.
- 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.
- Einstein Discovery for Insurance Analytics gives you predictions on the likelihood of policy renewals.
- 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.

EDITIONS

Available for an extra charge in Lightning Experience in **Enterprise** and **Unlimited** editions that have Financial Services Cloud enabled.

- 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).
- Analytics for Mortgage enables loan officers and managers to drive increased mortgage sales by helping prioritize the customer leads and mortgage applications to focus on. Measure and monitor your loan application volume, loan amounts, and loan application completion rate to quickly identify bottlenecks concerning opportunities, missing documents, and financial accounts. Analyze your loan applications to quickly process them through the loan pipeline and drive customer satisfaction by prioritizing applications. Gain visibility into who is processing loans faster, who has the highest volume loans, and who has more pending applications.

To learn which one is right for you, see [Use Financial Services Cloud Tableau CRM Solutions](#).



Tip: Follow the steps in the order shown to deploy Tableau CRM for Financial Services. If you haven't used Tableau CRM before, learn about it from Tableau CRM help.

[Enable Tableau CRM in Financial Services Cloud](#)

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

[Assign Tableau CRM for Financial Services Administrator Permissions](#)

Enable administrators to create and manage Tableau CRM for Financial Services by assigning the relevant permission sets.

[Grant Permission to the Analytics Integration User](#)

If you use Analytics for Insurance, assign the FSC Analytics Integration permission set to the Analytics Integration User.

[Assign Tableau CRM for Financial Services User Permissions](#)

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

[Get Your Data Ready to Create Tableau CRM 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 Tableau CRM 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 Tableau CRM for Financial Services Apps](#)

Follow these general steps to create and share the apps included in Tableau CRM for Financial Services. These include Analytics for Wealth Management, Predict Client Churn Risk for Wealth Management Analytics, Predict Likelihood to Add Assets for Wealth Management Analytics, Analytics for Insurance, Analytics for Retail Banking, Wealth Starter Analytics, Analytics for Mortgage, or Consumer Banking Starter Analytics.

[Embed Analytics for Wealth Management Dashboards in Lightning Pages](#)

Analytics for Wealth Management includes dashboards intended for embedding and access in Lightning Experience pages.

[Embed Analytics for Insurance Dashboards in Lightning Pages](#)

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

[Schedule the Data Sync and Dataflow for Tableau CRM for Financial Services Apps](#)

When you create Tableau CRM for Financial Services apps, the creation process includes a data sync and dataflows that make data available to dashboards. Schedule the sync and dataflows to run so dashboards show the latest data.

[Understand Tableau CRM for Financial Services Limitations](#)


Tableau CRM for Financial Services provides access to Tableau CRM capabilities and features.

SEE ALSO:

[Use Financial Services Cloud Tableau CRM Solutions](#)[Deploy Tableau CRM Prebuilt Apps](#)[Explore Data and Take Action with Tableau CRM](#)

Enable Tableau CRM in Financial Services Cloud

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

1.  **Note:** If you see a blue **Launch Tableau CRM** button in the upper right corner, Tableau CRM is already enabled and you can skip to “Assign Tableau CRM for Financial Services App Administrator Permissions.”
2. From Setup, enter *Getting Started* in the Quick Find box, and then select **Getting Started**.
3. Click **Enable Tableau CRM**.

SEE ALSO:

[Assign Tableau CRM for Financial Services Administrator Permissions](#)

Assign Tableau CRM for Financial Services Administrator Permissions

Enable administrators to create and manage Tableau CRM 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 Tableau CRM Plus 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 Tableau CRM for Financial Services.

Grant Permission to the Analytics Integration User

If you use Analytics for Insurance, assign the FSC Analytics Integration permission set to the Analytics Integration User.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Select the Analytics Integration User.
3. Go to Permission Set Assignments and then click **Edit Assignments**.
4. Select the **FSC Analytics Integration** permission set.
5. Click **Add**.
6. Save your changes.

Assign Tableau CRM for Financial Services User Permissions

Enable users to view Tableau CRM 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 Tableau CRM 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 Tableau CRM Plus User *and* FSC Analytics User permission sets.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to view Tableau CRM for Financial Services.



Warning: Users with the Tableau CRM Plus User permission set and Editor or Manager access to Tableau CRM apps can create, edit, and delete app assets.

Get Your Data Ready to Create Tableau CRM 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.

Tableau CRM 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 Analytics for Wealth Management:

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

The configuration wizard gives you the option of including lead history in dashboards. If you want to be able to do that, enable lead history in the Lead object.

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 Tableau CRM for Financial Services Apps](#). For quotas metrics to appear in relevant dashboards, you also have to import data from an external source. See [Import Quotas Data to the Analytics for Wealth Management App](#)

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
- Insurance Policy Coverage
- Claim
- Producer
- Lead, with History Tracking set.
- Opportunity
- Product

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 Tableau CRM for Financial Services Apps](#).

For orgs with Community Cloud only:

- Data about agencies is stored on the Accounts object with a record type Business Account.
- Data about agents is stored in the Contacts field on the Business Account object. Enable agents as Partner Users so they can access Analytics for Insurance through Communities.
- Data about agent managers is stored in the Contacts on the Business Account object. Enable agent managers as Partner Users and assign them the Partner User Manager user role so they can access Analytics for Insurance through Communities.
- Data about sales managers is stored on the User object and make sales managers owners for the Business Accounts (agencies) object.
- The Producer object needs to include a Contact Lookup field with information about agents and an Account Lookup field with information about agents' agency. Leaderboards in the app's sales manager dashboards consume data from these fields.

Optionally, enable Analytics for Communities if you want to give partners access to Analytics for Insurance:

- Assign users the Insurance Community User permission set. See [Grant Users Access to the Portal](#).
- Enable Analytics for Communities. See [Enable Analytics for Communities](#).

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 Tableau CRM and log back in to enable the setting.

[Import Earnings and Fees Data to Tableau CRM 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 Earnings and Fees .CSV File](#)

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

[Import Quotas Data to the Analytics for Wealth Management App](#)

Follow these steps to add quotas data from an external source to the Analytics for Wealth Management app.

[Analytics for Wealth Management Example Quota .CSV File](#)

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

SEE ALSO:

[Consumer Banking Starter Analytics Template](#)


Import Earnings and Fees Data to Tableau CRM 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.

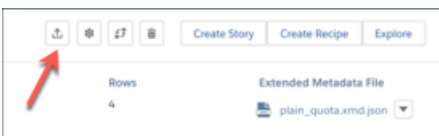
1. Create a .CSV file with the following columns (field names), in this order, with these exact names. Column names are case-sensitive:

Name	Contents
<i>product</i>	Names of your financial products, such as Annuity, ETF, and Mutual Fund.
<i>id</i>	A number that's used to identify the fee/earning record.
<i>date</i>	Date of the record in <i>mm-dd-yy</i> format.
<i>fees</i>	Amount of the fee for the record.
<i>revenue</i>	Amount of the revenue for the record.
<i>commission</i>	Amount of the commission for the record.
<i>aum</i>	Amount of assets under management (aum) for the record.

For an example, see [Analytics for Wealth Management Example Earnings and Fees .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 Tableau CRM.

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 the Analytics for Wealth Management App](#) or [Create and Share the Analytics for Insurance App](#).
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, Tableau CRM adds fees and earnings metrics to relevant dashboards.

Analytics for Wealth Management Example Earnings and Fees .CSV File

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

```
product,id,date,fees,revenue,commissions,aum
Annuity,1,2018-04-08,471.47,1266.59,142.1,688051.4
Annuity,2,2018-04-03,333.22,1779.32,634.29,1101404.38
ETF,3,2018-04-29,419.49,766.86,113.81,1150628.79
Life Insurance,4,2018-04-26,498.2,822.17,927.73,462348.11
Life Insurance,5,2018-02-17,450.12,1454.37,63.2,1110180.51
Life Insurance,6,2018-06-10,664.98,1908.04,659.39,1157066.6
Annuity,7,2018-04-12,0,667.34,0,1177799.88
ETF,8,2018-03-09,556.04,1052.64,922.76,919275.15
Mutual Fund,9,2018-06-27,170.19,1878.01,751.38,1140515.99
Mutual Fund,10,2018-02-23,0,1203.79,0,922238.4
Life Insurance,11,2018-01-18,268.01,556.91,392.37,841724.49
Mutual Fund,12,2018-02-04,689.72,1604.4,708.29,1094500.71
ETF,13,2018-02-09,282.24,1565.3,13.46,491790.29
Life Insurance,14,2018-07-12,755.09,809.98,992,598137.15
Life Insurance,15,2018-07-28,503.85,1178.26,177.14,573037.08
Annuity,16,2018-01-03,269.3,816.47,684.57,595944.41
ETF,17,2018-05-21,522.49,1645.45,764.25,440486.76
Annuity,18,2018-04-02,825.27,681.24,802.86,558388.76
Annuity,19,2018-03-12,213.86,1065.97,951.93,550783.13
Savings,20,2018-05-30,487.02,1123.16,508.36,454734.57
Annuity,21,2018-02-09,794.99,1885.09,668.64,606486.9
Life Insurance,22,2018-07-14,297.03,1422.7,49.78,801082.51
ETF,23,2018-05-05,969.78,1033.94,681.32,706809.66
Annuity,24,2018-05-24,172.19,1334.47,475.32,551905.53
ETF,25,2018-03-22,462.21,1793.9,64.15,1171338.12
Life Insurance,26,2018-04-18,772.53,783.78,974.62,1063116.75
Mutual Fund,27,2018-01-28,902.16,924.42,613.41,908242.05
ETF,28,2018-04-10,793.34,914,728.2,660987.47
```

Import Quotas Data to the Analytics for Wealth Management App

Follow these steps to add quotas data from an external source to the Analytics for Wealth Management app.

1. Create a .CSV file with the following fields, in this order, with exactly these names. Field names are case-sensitive:

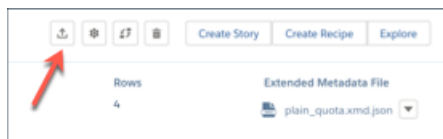
- a. StartDate (in yyyy-mm-dd format)
- b. QuotaAmount

- c. OwnerName
- d. Username

For an example, see [Analytics for Wealth Management Example Quota .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 Tableau CRM.

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 the Analytics for Wealth Management App](#).
4. Open the app, click Datasets, and locate the quotas 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, Tableau CRM adds fees and earnings metrics to relevant dashboards.

Analytics for Wealth Management Example Quota .CSV File

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

Note: This file is for example purposes only. Create a unique .CSV file with quota data for members of your team including the following fields:

- QuotaAmount
- StartDate
- OwnerName
- Username

Save the .CSV file in UTF-8 format. Field names are case-sensitive and must appear in your file exactly as shown here.

Important: Do not open the .CSV file with Microsoft Excel or another spreadsheet application, which can corrupt the file format.

Example:

```
QuotaAmount,StartDate,OwnerName,Username
150000,2016-01-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-02-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-03-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-01-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-02-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-03-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-01-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
```

```
150000,2016-02-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
150000,2016-03-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
150000,2016-01-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-02-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-03-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-01-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-02-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-03-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-01-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
150000,2016-02-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
150000,2016-03-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
```

Set Field-Level Security to Enable Creation of Tableau CRM 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 Tableau CRM for Financial Services Apps

Follow these general steps to create and share the apps included in Tableau CRM for Financial Services. These include Analytics for Wealth Management, Predict Client Churn Risk for Wealth Management Analytics, Predict Likelihood to Add Assets for Wealth Management Analytics, Analytics for Insurance, Analytics for Retail Banking, Wealth Starter Analytics, Analytics for Mortgage, 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:


 **Note:** The configuration wizard for some Tableau CRM for Financial Services templates let you customize your app by answering one or more questions. See the links below for details.

- **Analytics for Wealth Management.** To create and share this app, see [Create and Share the Analytics for Wealth Management App](#).
- **Predict Client Churn Risk for Wealth Management Analytics.** To create and share this app, see [Create and Share the Predict Client Churn Risk for Wealth Management Analytics App](#).
- **Predict Likelihood to Add Assets for Wealth Management Analytics.** To create and share this app, see [Create and Share the Predict Client Churn Risk for Wealth Management Analytics App](#).
- **Analytics for Insurance.** To create and share this app, see [Create and Share the Analytics for Insurance App](#).
- **Einstein Discovery for Insurance Analytics.** To create and share this app, see [Create and Share the Einstein Discovery for Insurance Analytics App](#).
- **Analytics for Retail Banking**
- **Wealth Starter Analytics**
- **Analytics for Mortgage**
- **Consumer Banking Starter Analytics**


Then click **Continue**.

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


4. Have a quick look at the template preview page, then click **Continue** to open the configuration wizard.
5. Tableau CRM 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 Analytics for Mortgage and Consumer Banking Starter Analytics templates include 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 something you and users can easily remember and click **Create**.

 **Note:** We recommend using the template name—for example, *Wealth Management*—in your app name to make it easier to find.

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 Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.

2. Click the Share icon  at upper right.

3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

 **Important:** Users with the “Use Analytics Templated Apps” permission and Editor or Manager access to the app can create, edit, and delete assets in the app.
5. Click **Add**, then click **Save**.

[Create and Share the Analytics for Insurance App](#)

Create an app from the Analytics for Insurance template and share it with your users.

[Create and Share the Einstein Discovery for Insurance Analytics App](#)

Create an app from the Einstein Discovery for Insurance Analytics template and share it with your users.

[Create and Share the Analytics for Wealth Management App](#)

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

[Create and Share the Predict Client Churn Risk for Wealth Management Analytics App](#)

Follow these steps to create and share an app from the Predict Client Churn Risk for Wealth Management Analytics template.

[Create and Share the Predict Likelihood to Add Assets for Wealth Management Analytics App](#)


Follow these steps to create and share an app from the Predict Likelihood to Add Assets for Wealth Management Analytics template.

SEE ALSO:

[Set Field-Level Security to Enable Creation of Tableau CRM for Financial Services Apps](#)

Create and Share the Analytics for Insurance App

Create an app from the Analytics for Insurance template and share it with your users.

 **Note:** Before you create the app, make sure that person accounts are enabled in your org. If they're not enabled, direct your admin to [Configure Person Accounts in Financial Services Cloud](#).

1. Navigate to **Tableau CRM Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Analytics for Insurance**, then click **Continue**.
4. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.
5. To create an app or use settings from an existing app, make a selection, and click **Continue**.
6. Tableau CRM performs a compatibility check of your Salesforce 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. After the app is created, click **Looks good, next**.
7. The next page of the wizard asks you to make two selections.
 - a. The first wizard question asks how you want Tableau CRM to store data in app datasets. Select **Snapshot** to capture all data from the Insurance Policy object once each 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. But overall performance can be slower.
 - b. Next, the wizard asks you to select a security predicate to apply to the data. Select **User Role Hierarchy** to make data visible to a user based on their hierarchical role and the policies they sold. Select **User Manager Hierarchy** to let a user view data that

belongs to users below them in the hierarchy and the policies they sold. Select **None** to make all data visible to anyone viewing the app.

- c. The next wizard question asks if you want to include lead history data in your dashboards. To include it, you must enable field history tracking for the following Lead object fields: Lead Status, Name, Lead Owner, Lead Source, and Product Interest.
- d. Next, the wizard asks if you want to include household data in your app. Select Yes to include household data in your app.

8. Click **Looks good, next**.


9. Name your app, then click **Create**.

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



Note: If you see an error message that the Analytics Integration User doesn't have access to selected fields, edit [Salesforce field-level security](#).

Share the app with your users. You can share it only with users assigned the admin or user permission sets for Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.



Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Create and Share the Einstein Discovery for Insurance Analytics App

Create an app from the Einstein Discovery for Insurance Analytics template and share it with your users.



Note: To successfully create the Einstein Discovery for Insurance Analytics app, make sure that the Insurance Policy object meets these requirements.

- At least 25 records with a renewal date in the past, and either the Date Renewed field or the Previous Renewal Date field contains a value.
- At least 25 records with a renewal date in the past, and both Date Renewed and Previous Renewal Date fields are empty.

1. Navigate to Tableau CRM Analytics Studio.
2. Click **Create**, then select **App**.
3. Select **Einstein Discovery for Insurance Analytics**, then click **Continue**.
4. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.
5. Tableau CRM performs a compatibility check of your Salesforce 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**.

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.


6. Select the fields that you want to add to your app. Select at least two fields with data that can improve the predictions.

 **Note:** Fields such as Age Group, State, or Gender can introduce bias into the analysis. We don't recommend selecting them.


7. Click **Looks good, next**.


8. Name your app, then click **Create**.

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

 **Note:** If you see an error that the Analytics Integration User doesn't have access to selected fields, edit [Salesforce field-level security](#).

Share the app with your users. You can share it only with users assigned the admin or user permission sets for Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

 **Important:** Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

[Apply Security Predicates to Your Datasets](#)




If you want to restrict users' access to data based on their hierarchical role or Manager Id, apply security predicates to the relevant datasets.

[Retrain Your Predictive Model](#)

To retrain a predictive scoring model, update and run the dataflow, refresh the story, and deploy the model.

Apply Security Predicates to Your Datasets

If you want to restrict users' access to data based on their hierarchical role or Manager Id, apply security predicates to the relevant datasets.

1. In Tableau CRM Analytics Studio, click  and select **Data Manager**.
2. Select **Data**.
3. Under Datasets, look for the dataset you want to apply predicates to, and click .
4. Select **Edit Dataset**.
5. Under Security Predicate, click .
6. In the text box, enter either of these strings:

- To apply User Role Hierarchy to the dataset, enter

```
'OwnerId' == "$User.Id" || 'Owner.Role.Roles' == "$User.UserRoleId"
```

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.



- To apply User Manager Hierarchy to the dataset, enter

```
'Owner.Managers' == "$User.Id"
```

If you want to retrain the predictive scoring model, remove the security predicates, update your story, and deploy your new model. If you retrain your model without removing the security predicates, the model is trained only with the data the user can access.

Retrain Your Predictive Model

To retrain a predictive scoring model, update and run the dataflow, refresh the story, and deploy the model.

- From Tableau CRM Analytics Studio, click  and select **Data Manager**.
- Select **Dataflows & Recipes**.
- Under DATAFLOWS, look for the dataflow you want to edit, and click .
- Select **Edit**.
- In the dataflow editor, replace the scoring filter node with your training filter node. Use the `RenewedFlag=="True"` SAQL filter as your training dataset filter node attribute. To learn more about adding filters to a dataset, see [Filter Transformation](#).
- Run the dataflow.
- After the dataflow is completed, refresh the Analytics home page and select the Stories subtab.
- Click the story you want to open.
- Einstein Discovery asks whether you want to refresh your story with the latest data. Click **Refresh field options from latest version**.
- After the story is updated, open it.
- From the Edit Story dropdown menu, select **Deploy Model**.

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.

Create and Share the Analytics for Wealth Management App

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

- Navigate to **Analytics Studio**.
- Click **Create**, then select **App**.
- Select **Analytics for Wealth Management**. Then click **Continue**.
- Have a quick look at the template preview page, then click **Looks good, next** to open the configuration wizard.
- 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**.
- Tableau CRM 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**.
- The next page of the wizard (labeled *Step 2 of 3*) asks you to make three selections. After you're done, click **Looks good, next**.
 - Would you like to add a security predicate to datasets?** If you answer **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.
 - Would you like the app to include trending data and visualizations?** If you select **Yes**, Tableau CRM adds snapshot datasets and shows trending visualizations in dashboards. If you select **No**, dashboards won't show trending. If you have large numbers


of records in objects, the number of rows in the snapshot datasets can grow quickly. Those rows count against your data limit. See [Understand Tableau CRM for Financial Services Limitations](#)


- c. **Choose the record types used to determine household accounts as well as person or individual accounts.** Your app datasets and dashboard include only accounts with the record types you select. Tableau CRM recommends record types to use. Add others or take away types you don't want to use.
8. The next page (labeled *Step 3 of 3*) asks you to make four more selections. After you're done, click **Looks good, next**.
 - a. **Would you like to include commissions and fees charts in dashboards?** If you answer **Yes**, you have to upload commissions and fees data from an external source to populate dashboard charts. See [Import Earnings and Fees Data to Tableau CRM for Financial Services Apps](#) on page 253.
 - b. **Would you like to include quotas charts in dashboards?** If you answer **Yes**, you have to upload quotas data from an external source to populate dashboard charts. See [Import Quotas Data to the Analytics for Wealth Management App](#) on page 254.
 - c. **Would you like to include lead history charts in dashboards?** If you answer **Yes**, be sure you've enabled lead history in the Leads object.
 - d. **Would you like to include financial account transactions charts in dashboards?** If you answer **Yes**, you must have already uploaded financial account transaction data from an external source to populate the charts.
9. Name your app and click **Create**.
10. 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 Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

 **Important:** Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.
5. Click **Add**, then click **Save**.

Create and Share the Predict Client Churn Risk for Wealth Management Analytics App

Follow these steps to create and share an app from the Predict Client Churn Risk for Wealth Management Analytics template.


1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Predict Client Churn Risk for Wealth Management Analytics**. 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. Tableau CRM 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 (labeled *Step 2 of 2*) asks you to make three selections. After you're done, click **Looks good, next**.
 - a. **Choose the record types used to determine household accounts as well as person or individual accounts.** Your app datasets and dashboard include only accounts with the record types you select. Tableau CRM recommends record types to use. Add others or take away types you don't want to use.
 - b. **Choose the record types of financial accounts to include.** Your app datasets and dashboard include only financial accounts with the record types you select. Analytics recommends record types to use. Add others or take away types you don't want to use.
 - c. **Would you like to include financial account transactions in the app?** If you select **Yes**, Tableau CRM adds financial account transactions in the dataset and as part of the Einstein Discovery story. You must have already uploaded financial account transaction data from an external source to be used by Einstein Discovery. If you select **No**, financial account transactions aren't used.
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 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 Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

 **Important:** Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.
5. Click **Add**, then click **Save**.

Create and Share the Predict Likelihood to Add Assets for Wealth Management Analytics App

Follow these steps to create and share an app from the Predict Likelihood to Add Assets for Wealth Management Analytics template.


1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Predict Likelihood to Add Assets for Wealth Management Analytics**. 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. Select a version of the Analytics for Wealth Management app you want to use to populate your data for this app. If you have not created an Analytics for Wealth Management yet, see [Create and Share the Analytics for Wealth Management App](#) and then try app creation again. Select the Analytics for Wealth Management app you want and click **Looks good, next**.
7. Tableau CRM 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**.
8. The next page of the wizard (labeled *Step 3 of 3*) asks you to make one selection. After you're done, click **Looks good, next**.
 - a. **Enter threshold for AUM Change calculation for Assets addition flag.** Enter a numeric value between 1–100000000 to set the threshold of AUM change for the Einstein Discovery story model. The default value is 10000.
9. Name your app and click **Create**.
10. 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 Tableau CRM for Financial Services.

1. Open your app if it's not already open. If you've navigated away from Tableau CRM Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.



Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Embed Analytics for Wealth Management Dashboards in Lightning Pages

Analytics for Wealth Management includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see [Embed Tableau CRM 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 Tableau CRM 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:

```
{'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:

```
{'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:

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

Opportunity. Embed in a product record page. Set the Filter attribute with the following:

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

Embed Analytics for Insurance Dashboards in Lightning Pages

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

For general instructions, see [Embed Tableau CRM Dashboards in Lightning Pages](#) in Salesforce Help. Here are examples using dashboards from the Analytics for Insurance app, including the code for the filter attribute set in Step 4 of [Embed Tableau CRM Dashboards in Lightning Pages](#).

Book of Business. Embed in Account or Contact record page layouts. Set the Filter attribute with the following:

```
{"datasets": {"FinancialAccountTransaction": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}], "Insurance_Policies": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}], "Claims": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}]}}
```

Customer. Embed in an Account record page layout. Set the Filter attribute with the following:

```
{"datasets": {"Insurance_Policies": [{"fields": ["PolicyOwner.Id"], "filter": {"operator": "in", "values": ["$Id"]}}]}}
```

Distributor Book of Business. Intended for access through your sales manager home page, but can be embedded anywhere you want to show data insights. No filter required.

Distributor Sales Performance. Embed in Account or Contact record page layouts. Set the Filter attribute with the following:

```
{"datasets": {"FinancialAccountTransaction": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}], "Insurance_Policies": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}], "Claims": [{"fields": ["Producer.Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}], "AllActivities1": [{"fields": ["Account.Id"], "filter": {"operator": "in", "values": ["$Id"]}}]}}
```

Key Distributors. Intended for access through your sales manager home page, but can be embedded anywhere you want to show data insights. No filter required

Lead. Embed in a Lead record page layout. Set the Filter attribute with the following:

```
{"datasets": {"AllLeads": [{"fields": ["Id"], "filter": {"operator": "in", "values": ["$Id"]} ]}]}
```

Opportunity. Embed in an Opportunity record page layout. Set the Filter attribute with the following:

```
{"datasets": {"Opportunity": [{"fields": ["Id"], "filter": {"operator": "in", "values": ["$Id"]} ]}]}
```

Likelihood to Renew Policy. Embed in an Account page layout. Set the Filter attribute with the following:

```
{"datasets": {"ED_LikelihoodToRenewPolicy": [{"fields": ["NameInsuredId"], "filter": {"operator": "in", "values": ["$Id"]}, "locked": null, "hidden": null}]}
```



Household. Embed in an Account page layout. Set the Filter attribute with the following:

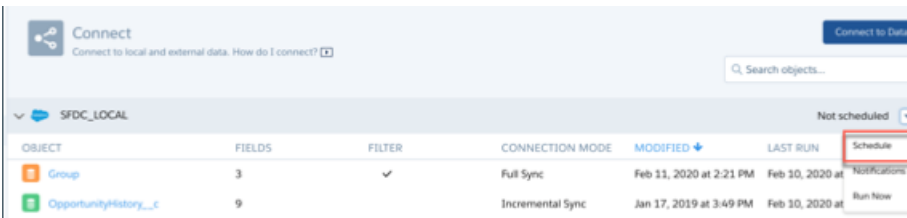
```
{"datasets": {"Account_Financials": [{"fields": ["Id"], "filter": {"operator": "in", "values": ["$Id"]}, "locked": null, "hidden": null}]}
```


Schedule the Data Sync and Dataflow for Tableau CRM for Financial Services Apps

When you create Tableau CRM for Financial Services apps, the creation process includes a data sync and dataflows that make data available to dashboards. Schedule the sync and dataflows to run so dashboards show the latest data.

1. In Tableau CRM Analytics Studio, click the wheel icon at upper right and select **Data Manager**. Or, click the **Data Manager** link in the left-hand column.
2. Schedule the sync. Select the **Connect** tab on the left.

 **Note:** If you can't see the **Connect** tab, enable data sync in your org. See [Enable Data Sync and Connections](#).
3. Open the dropdown by clicking the arrow  to the far right of **SFDC_LOCAL**, which is the name of the connection your app uses. From the menu that appears, select **Schedule**.



4. Set a time for running the data sync. It's best to select a time outside normal working hours so the sync and dataflow don't interrupt business activities. Then click **Save**.
5. Next, schedule the dataflows. Select the **Dataflows & Recipes** tab on the left.
6. Look for the dataflows that contain the name of your app. One at a time for each dataflow, click the triangle  to the far right to open the scheduler.
7. Select **Schedule**, then choose a time at least an hour after the time you chose to run sync. The sync then finishes pulling in the latest data before you run the dataflow. For better performance, if your app includes multiple dataflows, schedule them to run at different times.



Note: The Analytics for Insurance app includes a dataflow for GDPR compliance. It contains 'GDPR' in its name. It's recommended that you do not schedule the GDPR dataflow regularly. Instead, run it manually at times dictated by your business needs. Before running it, edit the dataflow to delete IDs for users, contacts, and accounts you wish to exclude from the app.

8. Click **Save.**

The sync and dataflows for your app now run every day at the times you set.

Understand Tableau CRM for Financial Services Limitations

Tableau CRM for Financial Services provides access to Tableau CRM capabilities and features.

Tableau CRM for Financial Services gives you the same access to Tableau CRM capabilities as the Tableau CRM Growth and Plus licenses. Consult this chart to see any limitations.

Table 21: Tableau CRM for Financial Services Limitations

Capability	Tableau CRM Growth or Plus; Tableau CRM for Financial Services
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	<ul style="list-style-type: none"> Tableau CRM Plus: 10 billion rows Tableau CRM Growth: 100 million rows
Can customize existing dashboards?	Yes
Can create dashboards?	Yes
Can customize existing datasets?	Yes
Can create datasets?	Yes
Can create custom Tableau CRM apps?	Yes
Supports Einstein Discovery and Community Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein artificial intelligence?	No
Supports Salesforce Inbox?	No

Einstein Referral Scoring for Financial Services Cloud

Einstein Referral Scoring helps you determine which referrals to prioritize by predicting a score from 0 through 100 for them. Einstein Referral Scoring uses machine learning.

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EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

[Enable Einstein Referral Scoring](#)

To build one or more predictions that score the referrals in your org, enable Einstein Referral Scoring for Financial Services Cloud.

[Assign User Permission Set to Use Einstein Top Referrals Component](#)

The Financial Services Cloud Referral Scoring User permission set must be assigned to users who use the Einstein Top Referrals Lightning component. This permission set allows users to add the component to Financial Services Cloud app home pages and view the component.

[Considerations for Building a Prediction](#)

Before you build predictions, here are a few things to keep in mind.

[Understand How Predictions Work](#)

Before you jump in and create your predictions, learn how the global prediction, its associated predictions, and example records work.

[Build a Prediction](#)

Build a prediction that scores referrals in your org.

[Review Your Prediction's Scorecard](#)

After you build the prediction, review its results in the prediction's scorecard. Check out big-picture metrics, like prediction quality and top predictors.

[Add the Einstein Top Referrals Component to Financial Services Cloud Apps](#)

The Einstein Top Referral Lightning Component displays the score for your referral records. Add this component to the home page of the Financial Services Cloud apps.

[View Referral Scores](#)

You can use the Einstein Top Referral Lightning component to view the scores that Einstein provides for referrals in your org.

Enable Einstein Referral Scoring

To build one or more predictions that score the referrals in your org, enable Einstein Referral Scoring for Financial Services Cloud.

1. In Setup, enter *Einstein Referral Scoring for Financial Services Cloud* in the Quick Find box, and select **Einstein Referral Scoring for Financial Services Cloud**.
2. Turn on Einstein Referral Scoring for Financial Services Cloud.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

USER PERMISSIONS

To enable Einstein Referral Scoring for Financial Services Cloud:

- Customize Application

Assign User Permission Set to Use Einstein Top Referrals Component

The Financial Services Cloud Referral Scoring User permission set must be assigned to users who use the Einstein Top Referrals Lightning component. This permission set allows users to add the component to Financial Services Cloud app home pages and view the component.

1. In Setup, enter *Permission Sets* in the Quick Find box, and select **Permission Sets**.
2. Click the **Financial Services Cloud Referral Scoring User** permission set.
3. Click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select the users who want to assign the permission set, and click **Assign**.
6. Click **Done**.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

USER PERMISSIONS

To assign permission sets to users:

- Customize Application

Considerations for Building a Prediction

Before you build predictions, here are a few things to keep in mind.

Supported Object

Referral scores are predicted based on the Lead object. Einstein Referral Scoring can score referrals in orgs where Person Accounts are enabled.

Permission to View Record Types

If you want to build a prediction to score custom referral records, ensure that you have Read permission on the custom referral records.

Permission to View Fields

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

If you want to base your prediction on custom fields, ensure that you have Read permission on the custom fields.

Dataset Requirements

Your dataset must have enough records for you to build a successful prediction. Here are the minimum requirements.

Type of Dataset	Minimum Number of Records
Leads records	400
Example Lead records for global prediction (and each segmented)	400
True and false values (for the field to predict)	100 per value

Prediction Update Frequency

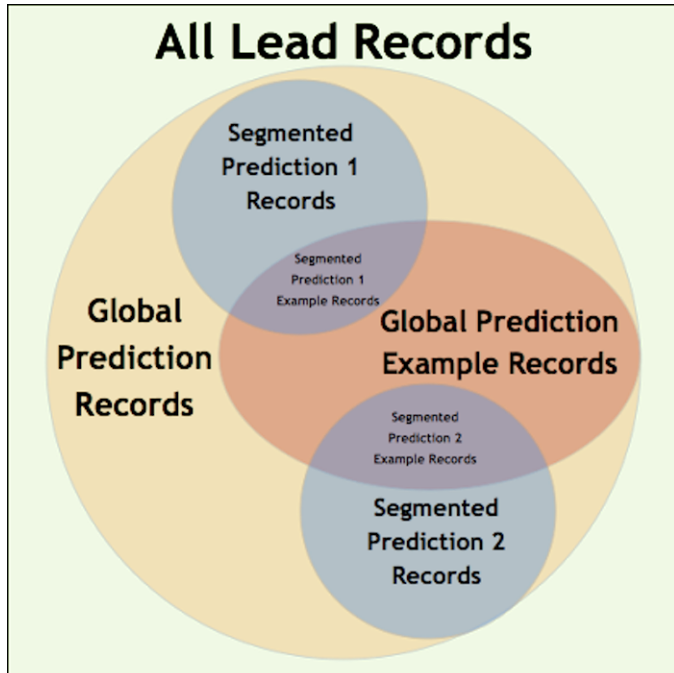
Enabled predictions are updated monthly using records that were created or updated during that month. Predictions are updated using records that match the example records filter criteria.

Predictions in Sandbox

Predictions created in production aren't copied to sandbox orgs. To use a prediction in sandbox, copy your licenses from production and build a new prediction. For best results, use a recently refreshed, full sandbox.

Understand How Predictions Work

Before you jump in and create your predictions, learn how the global prediction, its associated predictions, and example records work.




EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

- Global prediction: Scores all the records that are part of the Lead record types that you select while building a prediction.
- Segmented predictions: Each segmented prediction only scores the Lead records that contain the Lead field value you select to create the segment.
- Global prediction example records: All the records filtered from the Lead record types you select to build the global prediction for.

- Segmented prediction example records: All the records filtered from the Lead record types that contain the Lead field value you select to create the segment.

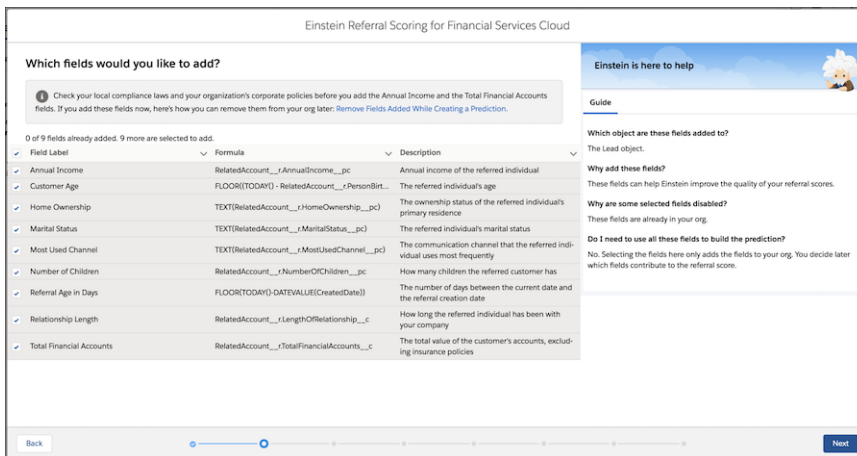
 **Note:** Example records aren't scored.

 **Example:** You can build a global prediction to score all Lead records of the type Personal Referral. Next, you can create two segmented predictions, one to score referrals interested in credit cards and one for referrals interested in personal loans. You can also choose to use personal referrals that are created before January 10, 2020 as example records. The global prediction's example records set contains all Personal Referrals created before January 10, 2020. The segmented prediction for credit cards' example record set contains all Personal Referral records with an interest in credit cards and are created before January 10, 2020. The segmented prediction for personal loans' example record set contains all Personal Referral records with an interest in personal loans and are created before January 10, 2020.

Build a Prediction

Build a prediction that scores referrals in your org.

- In Setup, enter *Einstein Referral Scoring for Financial Services Cloud* in the Quick Find box, and select **Einstein Referral Scoring for Financial Services Cloud**.
- Click **New Prediction**.
- Name your prediction, and click **Next**.
- Select the formula fields that you want to add to the Lead object, and click **Next**.



Einstein Referral Scoring for Financial Services Cloud

Which fields would you like to add?

Check your local compliance laws and your organization's corporate policies before you add the Annual Income and the Total Financial Accounts fields. If you add these fields now, here's how you can remove them from your org later: [Remove Fields Added While Creating a Prediction](#).

0 of 9 fields already added. 9 more are selected to add.

Field Label	Formula	Description
Annual Income	RelatedAccount__rAnnualIncome__pc	Annual income of the referred individual
Customer Age	FLOOR((TODAY() - RelatedAccount__rPersonBirthDate__c) / 365)	The referred individual's age
Home Ownership	TEXT(RelatedAccount__rHomeOwnership__pc)	The ownership status of the referred individual's primary residence
Marital Status	TEXT(RelatedAccount__rMaritalStatus__pc)	The referred individual's marital status
Most Used Channel	TEXT(RelatedAccount__rMostUsedChannel__pc)	The communication channel that the referred individual uses most frequently
Number of Children	RelatedAccount__rNumberOfChildren__pc	How many children the referred customer has
Referral Age in Days	FLOOR(TODAY() - DATEVALUE(CreatedDate))	The number of days between the current date and the referral creation date
Relationship Length	RelatedAccount__rLengthOfRelationship__c	How long the referred individual has been with your company
Total Financial Accounts	RelatedAccount__rTotalFinancialAccounts__c	The total value of the customer's accounts, excluding insurance policies

Back Next

The fields are added to your org when you click Next. These fields help improve the quality of your model. However, you can choose to not use these fields in your prediction.

 **Tip:** Refer to [Remove Fields Added While Creating a Prediction](#) on page 275 to learn how to remove the formula fields that add.

- Select the Lead record types that you want Einstein to predict referral scores for.

EDITIONS


Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

USER PERMISSIONS

To build a referral scoring prediction:


- Customize Application

6. Choose if you want to build one global prediction to score all your records or if you want to build a global prediction with individual predictions for specific segments.

 **Note:** Segments are created based on the values of a Lead picklist field. Segmented predictions only score referral records that are assigned the value that the segment is based on.

- If you want to create a global prediction, select **Don't segment (include all types of referrals)**.
- If you want to build segmented predictions, select **Yes, focus on a segment**, and complete the following steps:
 - a. Select the picklist field that contains the values you want to build segments for.
 - b. Select the values for which you want to build segments.

7. Click **Next**.
8. Select the True or False field that you want Einstein to provide a score for.

 **Tip:** You can select Converted as the field that Einstein predicts.

9. Choose whether Einstein uses all Lead record types that you selected as examples or only specific records.
10. Filter the records that Einstein uses as examples to build the prediction. Ensure that you don't use active referral records as examples.

11. Click **Check Data** on page 274 to validate if there are enough example records in your org to build a good prediction.
12. Click **Next**.
13. Deselect Lead Status, Clean Status, and the fields that you don't want Einstein to consider when scoring a referral, and click **Next**.

 **Note:** Fields like Lead Status and Clean Status might be derived from the field you are trying to predict.

 **Tip:** Deselect fields that are unique identifiers of your referrals, such as Individual.

14. Review your prediction settings. When you're ready, click **Build Prediction**.

15. Click **Done** after reading the celebration page.

After your predictions are built, they are enabled by default.

Check Your Data

Use Data Checker to see if you have enough records to build a useful prediction. Don't wait until after you build a prediction to find out that you don't have enough records or values for a particular field.

Disable, Edit, or Delete Predictions

Disable predictions that you want to edit or the ones that you don't want to use. You can edit predictions to change certain settings. Delete the predictions that you don't need anymore.

Remove Fields Added While Creating a Prediction

Creating a prediction can add one or more formula fields to the Lead object in your org. You can choose to remove these fields at anytime.

Check Your Data

Use Data Checker to see if you have enough records to build a useful prediction. Don't wait until after you build a prediction to find out that you don't have enough records or values for a particular field.



Warning: Data checker only checks for records being used to build the global prediction.

Check your records count at either of the two milestones when building a prediction:

- When you select a field to predict and select your example records
- When you review your prediction settings on the final page

At both milestones, the Data Checker checks if there are enough example records and if there are enough records for Einstein to predict a score for. The Data Checker also checks if there are at least 100 records for both True and False values of the field to predict.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

Disable, Edit, or Delete Predictions

Disable predictions that you want to edit or the ones that you don't want to use. You can edit predictions to change certain settings. Delete the predictions that you don't need anymore.

Disable Predictions

The global predictions and the segmented predictions can be disabled individually. If you disable the global prediction, the segmented predictions continue to score the referrals they are built for, but all the remaining referrals are not scored. If a segmented prediction is disabled, the global prediction scores the referral records for which the segmented prediction was built.

Edit Predictions

You can only edit disabled predictions. You can only perform the following actions while editing a prediction:

- Add formula fields to your org
- Choose which records must be used as examples
- Select or deselect which fields Einstein considers while scoring a referral

Delete Predictions

You can delete segmented predictions individually. If you want to delete the global prediction, delete the global prediction and all the segmented predictions. If you delete a prediction, the referrals scores generated by that prediction aren't available anymore.

On the Einstein Referral Scoring for Financial Services Cloud page, click  to:

- Disable, edit, or deleted segmented predictions
- Disable or edit the global prediction

To delete the global prediction along with its segmented predictions, click **Delete All** on the Einstein Referral Scoring for Financial Services Cloud page.

EDITIONS



Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

Remove Fields Added While Creating a Prediction

Creating a prediction can add one or more formula fields to the Lead object in your org. You can choose to remove these fields at anytime.



Tip: You can delete the fields that you no longer require after deleting a prediction.

1. In Setup, open **Object Manager**.
2. Enter *Lead* in the Quick Find box, and select **Lead**.
3. Move to the Fields & Relationships tab.
4.  Click  beside the formula field you want to delete, and select **Delete**.
5. Click **Delete**.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

USER PERMISSIONS

To delete a field:

- Customize Application

Review Your Prediction's Scorecard

After you build the prediction, review its results in the prediction's scorecard. Check out big-picture metrics, like prediction quality and top predictors.

 **Note:** The prediction scorecards display the API name of your prediction.

Overview Tab

The Overview tab shows the overall prediction quality, the top-five predictors in the model, and some basic information about your prediction. Depending on the prediction quality, decide if you want to use the prediction or not. The Last Updated field displays the last time the prediction was updated.

Predictors Tab

The Predictors tab shows the impact of each predictor in your model. Select a field included in your prediction to see its impact.

Details Tab

The Details tab lists the fields that affect your prediction, with multiple metrics to indicate how meaningful they are. If your prediction contains more than 100 predictors, you might not see them all. The scorecard shows you the top 100 predictors ranked by impact and the top 100 ranked by correlation. If your prediction has at least 100 predictors, the number displayed in the scorecard is likely to be between 100 and 200.

- Impact is a number between 0 and 1 that represents the scaled weight or importance of a predictor.
- Correlation is the relationship, positive or negative, between a predictor and the field being predicted.
- Importance and Weight indicate the significance of a predictor.

Settings Tab

The Settings page summarizes everything selected when setting up the prediction. If you want to change anything, you can edit your prediction and build again.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

Add the Einstein Top Referrals Component to Financial Services Cloud Apps

The Einstein Top Referral Lightning Component displays the score for your referral records. Add this component to the home page of the Financial Services Cloud apps.

1. Open the home page of the Financial Services Cloud app to which you want to add the Einstein Top Referral component.
2. Click Setup, and select **Edit Page**.
3. Drag the Einstein Top Referrals component to where you want the component to appear on the page.
4. In the Einstein Top Referrals panel, you can make the following changes:
 - Title: Change the name of the component
 - Referrals to Display: Change the number of referrals that are displayed on the component
5. Click **Save**, and then click **Activate**.
6. Move to the App Default tab and click **Assign to Apps**.
7. Select the apps to which you want to assign this home page, and click **Next**.
8. Click **Save**.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

USER PERMISSIONS

To add the Einstein Top Referrals component:

- Customize Application

View Referral Scores

You can use the Einstein Top Referral Lightning component to view the scores that Einstein provides for referrals in your org.

**Einstein Top Referrals**
Referrals created in last 7 days

Expressed Inter1

Personal Loan2

Last 7 days3

Adria Darby New - Not Contacted • Nov 28, 2019	94
Ada Balewa New - Not Contacted • Nov 28, 2019	82
Robert Bullard New - Not Contacted • Nov 28, 2019	68
Awhina Oahu New - Not Contacted • Nov 28, 2019	65
Lance Park New - Not Contacted • Nov 28, 2019	24

View All

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions where Financial Services Cloud is enabled with the Tableau CRM for Financial Services add-on license.

In the Einstein Top Referrals component, you can filter referrals by:

- 1 — Lead picklist field
- 2 — Lead field picklist value
- 3 — Created since

Lightning Scheduler

With Lightning Scheduler, you can provide personalized experiences to your customers or prospects by precision-scheduling appointments—in person or by phone or video—with the right person at the right place and time. You can easily embed appointment scheduling into standard Salesforce workflows, such as leads and referrals, opportunities, and accounts.

SEE ALSO:

[Salesforce Help: Manage Appointments with Lightning Scheduler](#)

EDITIONS

Lightning Scheduler is available for an extra cost in Lightning Experience.

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

Support Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get customer-submitted information such as W2 forms, tax returns, or other financial documents faster using the Intelligent Form Reader.

When a user uploads a document, Financial Services Cloud creates a record for that document. And then it allows the user to extract data from the document using an optical character recognition (OCR) process that runs in the background. You can use action plan templates to automatically attach the scanned document to a document checklist item or trigger a flow.

To make Intelligent Document Automation available to your users, identify the kinds of documents they're working with and decide how to handle the data from those documents.

How Document Management Works and Considerations

- The document management process begins when a user uploads a PDF, JPG or PNG file to Financial Services Cloud.

How Intelligent Form Reader Works and Considerations

- The extracted data is mapped to Salesforce objects as defined by the admin.
- The OCR Document Scan Result object contains financial information, such as account details or employment history, extracted from documents used in the loan application. The `ExtractedValues` field in this object can be encrypted.
- In PDF files, optical character recognition doesn't extract data from Acrobat fillable fields. To extract this data, convert the PDF to a static or flat document by printing it as a new PDF.
- Resend the document if the OCR extraction fails.

[Set Up Intelligent Document Automation](#)

Assign permissions to users who process mortgage applications, typically loan officers. Create the document types used to process mortgage applications. For example, create a residential loan application document type that you can use when defining the data extraction fields.

Set Up Intelligent Document Automation

Assign permissions to users who process mortgage applications, typically loan officers. Create the document types used to process mortgage applications. For example, create a residential loan application document type that you can use when defining the data extraction fields.

1. If you process PDF files, turn on the alternate file previews option in Salesforce File Settings.
From Setup, in the Quick Find box, enter *General Settings*, then select **General Settings** and click **Display alternative file previews**.
2. Turn on Document Checklist.
From Setup, in the Quick Find box, enter *Document Checklist Settings*, and select **Document Checklist Settings**, then move the **Checklist Items with Attachments** slider to **On**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use mortgage:

- Platform and Permset licenses

To work with documents:

- Document Checklist


3. Assign the permissions and permissions sets that your users require to work with forms.
 - a. Assign the Document Checklist license to the users or groups that work with the forms.
For example, for mortgages, users typically are loan officers.
 - b. From Setup, in the Quick Find box, enter *Permission Sets*, select **Permission Sets**, and then select **Document Checklist**.
 - c. Click **Manage Assignments** > **Add Assignments**, select your users and click **Assign**.
4. For mortgage applications, create a document type.
 - a. From Setup, in the Quick Find box, enter *Document Type*, and select **Document Type** and then click **New Document Type**. Give your document type a label and name, such as Residential Loan Application, then save it.
Repeat the steps to create document types for any source data that you work with.

Intelligent Form Reader

Intelligent Form Reader provides optical character recognition to automatically extract data from financial documents. You specify the data's source form, then map the fields in the form to the equivalent fields in Salesforce. Use the extracted information to create or update record fields or to verify existing data. For example, check a birthdate in Salesforce against the birthdate in a scanned passport.

Intelligent document automation works with PDF, JPG, and PNG image files. The extracted data is mapped to the Salesforce objects that you define.

To add form types, [create another document type](#) on page 278 and specify the form type.

 **Important:** The `ExtractedValues` field in the OCR Document Scan Result object can be encrypted. It contains applicant information such as income or account details extracted from documents used in the loan application process.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

[Enable Intelligent Form Reader](#)

Intelligent Form Reader provides optical character recognition for data extraction using Amazon Textract.

[Map Form Types to Objects](#)

Specify the data object where you want to store the information for each type of incoming form.

[Automatic Data Extraction From Custom Forms](#)

Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

[Set Up Data Extraction](#)

Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

Enable Intelligent Form Reader

Intelligent Form Reader provides optical character recognition for data extraction using Amazon Textract.

Before you enable Intelligent Form Reader:

- Make sure you understand [how Intelligent Form Reader works and its considerations](#) on page 278.
 - [Assign permission to users and create document types](#) on page 278 that you require.
1. Turn on Intelligent Form Reader.

From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and select **Intelligent Form Reader**, and then move the **Enable Intelligent Form Reader** slider to **Enabled**.

Map Form Types to Objects

Specify the data object where you want to store the information for each type of incoming form.

1. On the Intelligent Form Reader setup page, click **New Mapping**.
2. Give your matched form and object a name, such as Residential Loan Form Data.
3. For Form, choose the data's source document. For this example, try Residential Loan Application. The values listed in the dropdown are created when you [define a document type](#) on page 278.


You want to [set up a similar document type](#) on page 278 for each kind of form you expect to receive for mortgage applications. For example, consider creating Employment Details, Account Details, and Income Details.

 **Note:** Only one mapped form type to target object pair can be active at a time.

- a. If you select the Form Type as Custom Form, then you can browse and upload the required forms.

You can upload a maximum of five forms of 5 MB each in the supported formats, such as *.jpg, *.jpeg, *.png, *.pdf.

4. For Target Object, select the Salesforce object where the data is stored.
For example, some data on a mortgage form that identifies the loan applicant, such as name and address, goes in the Contact object.

 **Tip:** Each user sees a list of objects to choose from according to their access level. Review the permissions assigned to your users and ensure they see all the objects that they need.

Mappings					
9 Mappings					
Name	Target Object	Mapped Fields	Created By	Created On	Status
W2	ResidentialLoanApplication	7	Admin User	November 26, 2020	Active
W2 to Applicant Employment	LoanApplicantEmployment	3	Kianini Komer	December 03, 2020	Inactive

Automatic Data Extraction From Custom Forms

Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

1. Click **Add Key**.
2. For Form Field, specify a kind of data in the incoming form, such as Name of the loan applicant.
3. Under Target Object Fields, choose the field in the Salesforce object that matches the field in the incoming form.
For example, if there's a Name field in the incoming form, choose Name in the Contact object.

Form Fields		Target Object Fields	
1	0 Employee's name, address, and ZIP code	Name	
2	2 Federal income tax withheld	Federal income tax withheld	
3	0 Medicare tax withheld	Other Loan Feature	
4	1 Wages, tips, other compensation	Wages	
5	0 Medicare wages and tips	Medicare wages	
6	0 Social security wages	Social Security Wages	

 **Note:** You can't change a target object after it's set.

For multiple fields with duplicate values, such as a phone number, an alert appears when the users start data extraction. They can then choose which value to map to a field. For example, when a form contains phone numbers of the primary and the co-applicant, the user can specify which phone number to map to which phone field in Salesforce.

4. After you add the keys that you need, save your work and then click **Activate**.

Now your users can upload documents into Financial Services Cloud and have the data automatically extracted the data into Salesforce data objects. View the scanned pages and content records for the document on the OCR Document Scan Result related list.

Set Up Data Extraction

Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

1. Click **Add Key**.
2. For Form Field, specify a kind of data in the incoming form, such as Name of the loan applicant.
3. Under Target Object Fields, choose the field in the Salesforce object that matches the field in the incoming form. For example, if there's a Name field in the incoming form, choose Name in the Contact object.

The screenshot shows the 'Set Up Data Extraction' interface. At the top, there are tabs for 'Details', 'Activate', and 'Save'. Below these, there are two dropdown menus: 'Form Type' (set to 'W2 Form') and 'Target Object' (set to 'ResidentialLoanApplication'). An 'Add Key' button is located to the right of the 'Target Object' dropdown. Below these are two columns: 'Form Fields' and 'Target Object Fields'. The 'Form Fields' column lists six items: 1. Employer's name, address, and ZIP code; 2. Federal income tax withheld; 3. Medicare tax withheld; 4. Wages, tips, other compensation; 5. Medicare wages and tips; 6. Social security wages. The 'Target Object Fields' column lists six corresponding fields: Name, Federal income tax withheld, Other Loan Features, Wages, Medicare wages, and Social Security Wages. Each row has a dropdown arrow and a small icon to its right.

 **Note:** You can't change a target object after it's set.

For multiple fields with duplicate values, such as a phone number, an alert appears when the users start data extraction. They can then choose which value to map to a field. For example, when a form contains phone numbers of the primary and the co-applicant, the user can specify which phone number to map to which phone field in Salesforce.

4. After you add the keys that you need, save your work and then click **Activate**.

Now your users can upload documents into Financial Services Cloud and have the data automatically extracted the data into Salesforce data objects. View the scanned pages and content records for the document on the OCR Document Scan Result related list.

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.

EDITIONS

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.


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

Pre-Deployment Tasks for Einstein Bots for Financial Services Cloud

Complete the following tasks before deploying 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:** 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:** 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:

1. Copy `https://industries.secure.force.com/einsteinbotsforfinancialservicescloud` into your browser, and press **Enter**.
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, from the App Launcher (⋮), find and open **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, from the App Launcher (⋮), find and open **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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[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.

Item	Where to Find This Information
Last six digits of the card you want to report as lost or register a travel plan for	<ol style="list-style-type: none"> 1. In your Salesforce org, from the App Launcher (⋮), find and open 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	<ol style="list-style-type: none"> 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 286.
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 286.
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, from the App Launcher (⋮), find and open **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.

EXTEND FINANCIAL SERVICES CLOUD WITH OTHER SALESFORCE PRODUCTS

Use other Salesforce products with Financial Services Cloud.

[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.

[Salesforce Flow for Financial Services Cloud](#)

For Financial Services Cloud, Salesforce provides different sets of pre-assembled flows that are tailored to meet specific business needs. These sets of flows include mortgage, insurance, and retail banking flows. With Financial Services Cloud, you get the mortgage flows, by default. However, to get the insurance and retail banking flows, you must install the Lightning Flow for Financial Services Cloud package. The flows are installed as standard flow templates. You can clone the templates to customize them according to your business processes.

[Guidelines for Salesforce for Outlook](#)

If your firm uses Salesforce for Outlook, consider these guidelines when syncing contacts, events, tasks, and email.

[Connect to Customers with Pardot in Financial Services Cloud](#)

Access Pardot, a full suite of marketing tools, in Financial Services Cloud.

[Financial Services Cloud in the Salesforce Mobile App](#)

Boost user productivity by including Financial Services Cloud features in the Salesforce Mobile App.

EDITIONS

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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:

[Financial Services Cloud Availability and Limitations](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Salesforce Flow for Financial Services Cloud

For Financial Services Cloud, Salesforce provides different sets of pre-assembled flows that are tailored to meet specific business needs. These sets of flows include mortgage, insurance, and retail banking flows. With Financial Services Cloud, you get the mortgage flows, by default. However, to get the insurance and retail banking flows, you must install the Lightning Flow for Financial Services Cloud package. The flows are installed as standard flow templates. You can clone the templates to customize them according to your business processes.

[Salesforce 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.

[Salesforce Flow for Mortgage](#)

Financial Services Cloud includes standard flow templates that are specific to mortgage. These flows focus on collecting mortgage application information from loan officers and borrowers. The mortgage-type flows are standard flow templates; you can use them as-is or customize them according to your mortgage application needs.

[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.

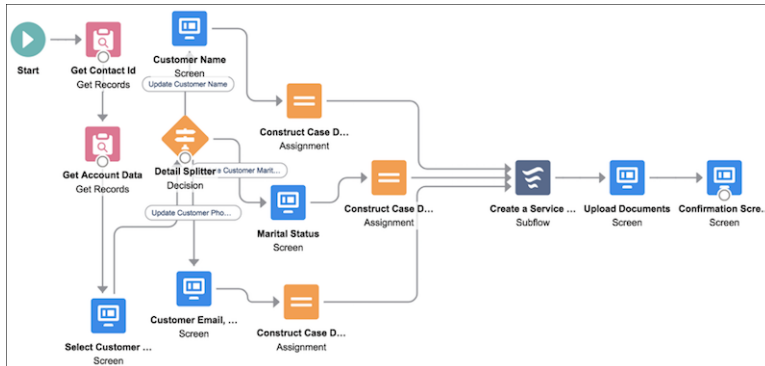
EDITIONS

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

Salesforce 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.



EDITIONS

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

[Install Salesforce Flow for Financial Services Cloud](#)

Install the Lightning Flow for Financial Services Cloud package from your preferred browser.

[Configure Salesforce 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.

Install Salesforce Flow for Financial Services Cloud

Install the Lightning Flow for Financial Services Cloud package from your preferred browser.

Before you can install the Lightning Flow for Financial Services Cloud package, Person Accounts must be enabled for your org.

1. Copy and paste the following URL into your browser, and press **Enter**.
<https://industries.secure.force.com/financialservicescloudflow>
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?](#)

EDITIONS

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

You can now complete the configuration steps to make the flows ready for use.

SEE ALSO:

[Enable Person Accounts](#)

[Configure Person Accounts in Financial Services Cloud](#)

Configure Salesforce 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.

[Create a Case Record Type](#)

Create a case record type for the cases that the flows create.

[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.

EDITIONS

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

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.

EDITIONS

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

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.

EDITIONS

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

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**.

EDITIONS

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

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.

EDITIONS

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

[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 22: Flows for Retail Banking

Flow	Purpose
Activate Card	Activate a new debit or credit card linked with a financial account.
Close Account	Close a financial account.
Dispute Transactions	Dispute one or more transactions for a financial account.
Issue New Card	Issue a new card for a financial account and send it to the customer's billing or shipping address.
Order Checks	Send checks for a financial account to the customer's billing or shipping address.
Send Documents	Send various financial documents for an account to the customer's billing or shipping address.
Send Statement	Email an account statement or send it to the customer's billing or shipping address.
Update Address	Change the address associated with a financial account.
Update Billing Date and Frequency	Change the billing date and frequency for a financial account.
Update Card Limits	Update the daily withdrawal or credit limit for a card associated with a financial account.

EDITIONS

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

Flow	Purpose
Update Communication Preferences	Update a customer's communication preferences. The preferences include email, phone, marketing, and fax.
Waive Fees	Waive the fees levied on a financial account.

Table 23: Flows for Insurance

Flow	Purpose
Add Beneficiary to Policy	Add a beneficiary to a life or home insurance policy.
Add Driver to Auto Policy	Add a driver to an auto insurance policy.
Cancel Policy	Cancel an insurance policy.
Initiate FNOL	Initiate the first notification of loss for an insurance policy.
Initiate Loan Against Policy	Initiate a loan against a policy at the customer's request.
Send Documents	Send policy-related documents for an insurance policy to the customer's billing or shipping address.
Update Communication Preferences	Update a policyholder's communication preferences. The preferences include email, phone, marketing, and fax.
Update Customer Details	Update policyholder information, such as name, email address, and phone number.
Update Lienholder	Change the lienholder on a home or auto insurance policy.
Update Policy Beneficiary Details	Update a policy beneficiary's information, such as name, email address, phone number, and share percentage.
Update Premium Payment Date and Frequency	Change the premium payment date and frequency for an insurance policy.
Update Premium Payment Method	Change the current method or add a method for paying the premium of an insurance policy.

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.

EDITIONS

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

- Now create a quick action for the 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.

- Now add the quick action 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.

- EDITIONS

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

EDITIONS

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

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**.

EDITIONS

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

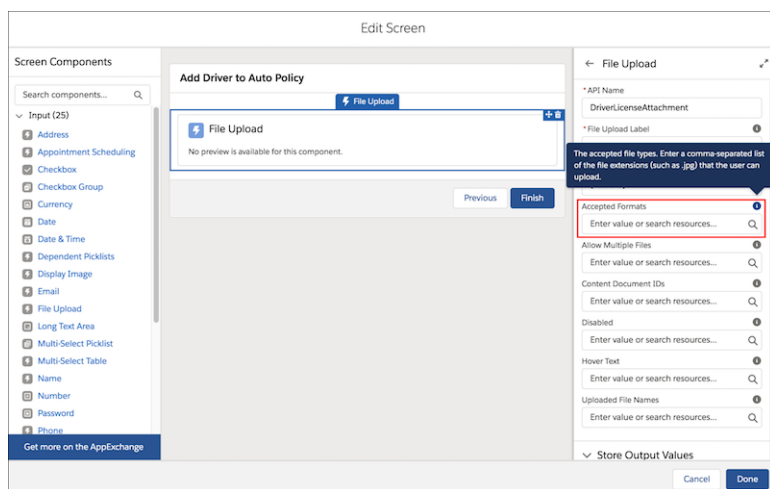
Restrict File Types to Upload in a Flow

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.

EDITIONS

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



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.

EDITIONS

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

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.

EDITIONS

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

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

EDITIONS

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

- 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.

Salesforce Flow for Mortgage

Financial Services Cloud includes standard flow templates that are specific to mortgage. These flows focus on collecting mortgage application information from loan officers and borrowers. The mortgage-type flows are standard flow templates; you can use them as-is or customize them according to your mortgage application needs.

Provided Flows

The mortgage standard flow templates are based on the U.S. Uniform Residential Loan Application released in February 2019. The flows walk loan officers and borrowers through the application process for a residential loan application record in three flows. Other flows provide a loan summary view and allow borrowers to launch a mortgage flow for generic help (create a case).

Customize Standard Flow Templates

The mortgage flows in Financial Services Cloud are installed as standard flow templates. You can customize any of the flows to suit your business needs.

EDITIONS


Financial Services Cloud is available in Lightning Experience.

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

Provided Flows

The mortgage standard flow templates are based on the U.S. Uniform Residential Loan Application released in February 2019. The flows walk loan officers and borrowers through the application process for a residential loan application record in three flows. Other flows provide a loan summary view and allow borrowers to launch a mortgage flow for generic help (create a case).

To run a mortgage flow, you must already have a residential loan application record.

Flow	Purpose
Assets and Liabilities Assets and Liabilities Subflow	Collects borrower financial details like account assets, real estate assets, other assets, liabilities, and monthly expenses.  Note: To run the Assets and Liabilities flow, the residential loan application must have at least one associated loan applicant record.
Borrower Information Borrower Information Subflow	Collects personal borrower details like name, address, military service, employment history, other income, application property details, declarations, and demographics.
Lender Loan Information	Collects general application details like property, title, loan, borrower qualification details, and homeowner education or housing counseling attendance.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Flow	Purpose
Mortgage Flow Launcher	Collects borrower details of a request for help with loans or loan applications. Supports borrower document uploads.
Summary View	Displays summary sections for selected mortgage objects based on the Unified Residential Loan Application (URLA).

Customize Standard Flow Templates

The mortgage flows in Financial Services Cloud are installed as standard flow templates. You can customize any of the flows to suit your business needs.

The Borrower Information and Assets and Liabilities mortgage flows rely on the Borrower Information Subflow and the Assets and Liabilities Subflow respectively. If you want to create a custom version of any flow that relies on a subflow:

1. Create the custom subflow.
2. Create the custom main flow
3. Update the references to the custom subflow in the custom main flow.

 **Note:** Mortgage flows can't be paused, so you can't add Pause elements when customizing mortgage flows.

To customize a flow, create a flow based on the standard template flow.

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 customize, and click **Create**.
4. Customize the flow according to your business requirements, and then save your changes.
5. 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**.

Make sure that your Actions and Recommendations deployment exposes your customized mortgage flows instead of the standard flow templates. Also, specify your customized mortgage flows in the flow elements or flow-type quick actions that you use to expose your mortgage flows to borrowers in Communities.

SEE ALSO:

[Provided Flow Screen Components](#)

[Update Community Pages](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

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.

EDITIONS

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

[Flow Screen Input Component: Button Picklist from Collection](#)

Display labels from a collection variable in a list of buttons.

[Flow Screen Input Component: Button Picklist from Field](#)

Display labels from a collection variable in a list of buttons.

[Flow Screen Input Component: Checkbox Group from Collection](#)

Populate a checkbox group with values from a text collection variable, and let user choose multiple options.

[Flow Screen Input Component: 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.

[Flow Screen Input Component: Multi-Select Table](#)

Display a table with a checkbox next to each row in the table. A user can select one or more rows in the table.

[Flow Screen Input Component: Screen Button](#)

Add a custom button to the body of your screen.

[Flow Screen Input Component: Single-Select Table](#)

Display a table with a radio button next to each row in the table. A user can select one of the rows in the table.

[Flow Screen Input Component: Section Summary View](#)

Displays selected mortgage objects based on the Unified Residential Loan Application (URLA). All objects in the collections variable for the Section Summary component must be API names of Mortgage objects.

[Flow Screen Input Component: Button Picklist from Account ID](#)

Displays relevant information about all residential loan application and financial account records associated with the account ID of the logged in user in a button picklist. If the flow user selects a financial account, the control sets the case record to the associated financial account ID.

SEE ALSO:

[Provided Flow Screen Components](#)

Flow Screen Input Component: Button Picklist from Collection

Display labels from a collection variable in a list of buttons.

A screenshot of a flow screen component. It features a title "Do you want to add an employer?" centered at the top. Below the title are two buttons: "Yes" and "No", each with a small icon to its left. The buttons are arranged vertically.

For information about adding screen components to your flow screen, see [Flow Element: Screen](#).




Note: This screen component requires [Lightning runtime](#).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Configure the Button Picklist from Collection Component

Attribute	Description
API Name	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.
Choice Labels	Add a text collection variable containing choice labels to this component.  Note: You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.
Label	User-friendly text that displays above the component.
Required	Requires users to select a value before they can move to the next screen.
Selected Value	A variable containing default choice value.

Store the Button Picklist from Collection Component in the Flow

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 Values 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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

[Flow Screen Components Provided in Financial Services Cloud](#)

[Provided Flow Screen Components](#)

Flow Screen Input Component: Button Picklist from Field

Display labels from a collection variable in a list of buttons.

Select the type of mortgage loan the borrower's applying for

Conventional

Veterans Affairs

Federal Housing Authority

USDA or Rural Housing Service


Other

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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

Attribute	Description
API Name	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.
Label	User-friendly text that displays above the component. This attribute accepts single-value resources. The value is treated as text.
Object API Name	The API name of the object that the picklist field belongs to.
Picklist API Name	The API name of the picklist field.
Required	Requires users to select a value before they can move to the next screen.
Selected Value	The default value for the component.

Store the Button Picklist from Field Component in the Flow

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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:


[Flow Screen Components Provided in Financial Services Cloud](#)
[Provided Flow Screen Components](#)

Flow Screen Input Component: 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](#).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Configure the Checkbox Group from Collection Component

Attribute	Description
API Name	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.
Choice Labels	Add a text collection variable containing choice labels to this component.  Note: You can't reorder choices or select the same choice twice.
Choice Values	A collection variable containing API values that correspond to the choice labels for this component.
Group Label	User-friendly text that displays above the component.
Selected Values	A collection variable containing default choice values.

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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

- [Flow Screen Components Provided in Financial Services Cloud](#)
- [Provided Flow Screen Components](#)

Flow Screen Input Component: 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 Custom Buttons Component

Attribute	Description
API Name	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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Attribute	Description
Custom Button Label	The label for the custom button. This attribute accepts single-value resources. The value is treated as text.
Custom Button Value	Whether the button was clicked. This attribute accepts single-value Boolean resources.
Next Button Label	The label for the Next button. This attribute accepts single-value resources. The value is treated as text.
Show Previous Button	Whether the Previous button is displayed. This attribute accepts single-value Boolean resources.

Store the Footer with Custom Buttons Component in the Flow

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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

[Flow Screen Components Provided in Financial Services Cloud](#)
[Provided Flow Screen Components](#)

Flow Screen Input Component: Multi-Select Table

Display a table with a checkbox next to each row in the table. A user can select one or more rows in the table.

Select the transactions to dispute.			
<input type="checkbox"/>	Transaction Name	Amount	Transaction Date
<input type="checkbox"/>	T-000000005	\$16.00	Jun 14, 2019
<input type="checkbox"/>	T-000000000	\$12.00	Jun 10, 2019
<input type="checkbox"/>	T-000000001	\$23.00	Jun 12, 2019
<input type="checkbox"/>	T-000000002	\$23.00	Jun 11, 2019
<input type="checkbox"/>	T-000000003	\$65.00	Jul 8, 2019

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions




For information about adding screen components to your flow screen, see [Flow Element: Screen](#).



Note: This screen component requires [Lightning runtime](#).

Configure the Multi-Select Table Component

You can select resources from the flow, such as variables or global constants, or you can manually enter a value.

Attribute	Description
API Name	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.
Columns	Required. Defines columns for the table. Add a Text collection variable that contains a list of field API names that you want to include in the table.
Records	Required. Defines rows for the table. Add a Text collection variable that contains a list of record IDs that you want to include in the table.  Important: Ensure that the variable contains at least one record ID. Otherwise, the component shows an error message when you run the flow.
Editable Column	Enter the API name of the column that you want to be editable in the table.  Note: You can have only one editable column, and it must be one of the columns that you entered in the Columns field.
Error Messages	Add a Text variable to store error messages returned by the component.
Selectable Rows	If it's set to <code>\$GlobalConstant.True</code> , the rows in the table are selectable. By default, it's set to <code>\$GlobalConstant.False</code> .
Selected Records	Add a Text collection variable to store the selected records.  Tip: To access individual record IDs, create a loop that iterates over this collection variable.


Store the Multi-Select Table Component's Values in the Flow


When you add a screen component to a flow, we automatically store all the attribute values in a variable. When the user navigates to the next screen, the values are assigned to the flow variable.

To store values manually, select **Manually assign variables (advanced)**.

All attributes are available to store in flow variables, but the Selected Records attribute is the most likely attribute to store.

To store the records that the user selected, map the Selected Records attribute to a text 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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

 **Example:** In a Dispute Transactions flow, a table shows all the transactions for the selected financial account. Users can select one or more transactions that they want to dispute.

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.

Edit Assignment

*Label

AssignTransactionColumns

*API Name

AssignTransactionColumns

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable

{!TransactionColumns}

Operator

Add

Value

Name

Variable

{!TransactionColumns}

Operator

Add

Value

fscwmain__Amount__c

Variable

{!TransactionColumns}

Operator

Add

Value

fscwmain__TransactionDate__c

+ Add Assignment

Cancel

Done

- 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.

When a user runs the flow, the table shows all the transactions for the financial account that the user selects.

Dispute Transactions

Select the transactions to dispute.

<input type="checkbox"/>	Transaction Name	Amount	Transaction Date
<input checked="" type="checkbox"/>	T-000000005	\$16.00	Jun 14, 2019
<input type="checkbox"/>	T-000000000	\$12.00	Jun 10, 2019
<input type="checkbox"/>	T-000000001	\$23.00	Jun 12, 2019
<input checked="" type="checkbox"/>	T-000000002	\$23.00	Jun 11, 2019
<input type="checkbox"/>	T-000000003	\$65.00	Jul 8, 2019

Previous

Next

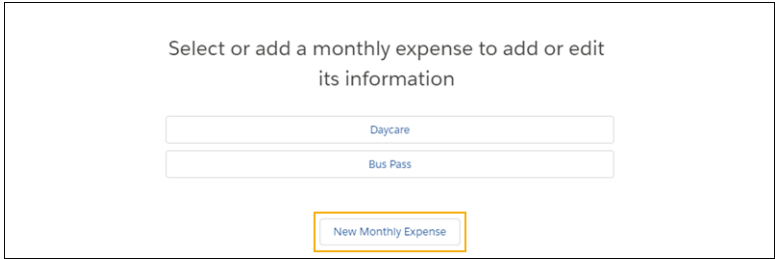
SEE ALSO:

[Flow Screen Components Provided in Financial Services Cloud](#)

[Provided Flow Screen Components](#)

Flow Screen Input Component: 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](#).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Configure the Screen Button Component

Attribute	Description
API Name	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.
Button Value	Whether the button was clicked. This attribute accepts single-value Boolean resources.
Label	The label for the button. This attribute accepts single-value resources. The value is treated as text.

Store the Screen Button Component's Values in the Flow

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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

- [Flow Screen Components Provided in Financial Services Cloud](#)
- [Provided Flow Screen Components](#)

Flow Screen Input Component: Single-Select Table

Display a table with a radio button next to each row in the table. A user can select one of the rows in the table.

Select the transaction to waive.

DESCRIPTION	AMOUNT	TRANSACTION DATE
<input type="radio"/> Card fee	\$16.00	Jun 14, 2019
<input type="radio"/> Misc. charges	\$23.00	Jun 11, 2019

EDITIONS

Available in: both Salesforce Classic and Lightning Experience


Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

For information about adding screen components to your flow screen, see [Flow Element: Screen](#).

 **Note:** This screen component requires [Lightning runtime](#).

Configure the Single-Select Table Component

You can select resources from the flow, such as variables or global constants, or you can manually enter a value.

Attribute	Description
API Name	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.
Columns	Required. Defines columns for the table. Add a Text collection variable that contains a list of field API names that you want to include in the table.
Records	Required. Defines rows for the table. Add a Text collection variable that contains a list of record IDs that you want to include in the table.  Important: Ensure that the variable contains at least one record ID. Otherwise, the component shows an error message when you run the flow.
Error Messages	Add a Text variable to store error messages returned by the component.
Selected Record	Add a Text variable to store the selected record.



Store the Single-Select Table Component's Values in the Flow

When you add a screen component to a flow, we automatically store all the attribute values in a variable. When the user navigates to the next screen, the values are assigned to the flow variable.

To store values manually, select **Manually assign variables (advanced)**.

All attributes are available to store in flow variables, but the Selected Record attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the record that the user selected, map the Selected Record attribute to a text 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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.
-  **Example:** In a Waive Fees flow, a table shows all the transactions for the selected financial account. Users can select only one transaction to waive.

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.

Edit Assignment

*Label

AssignTransactionColumns

*API Name

AssignTransactionColumns

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable

{!TransactionColumns}

Operator

Add

Value

Name

Variable

{!TransactionColumns}

Operator

Add

Value

fscwmain__Amount__c

Variable

{!TransactionColumns}

Operator

Add

Value

fscwmain__TransactionDate__c

+ Add Assignment

Cancel Done

- 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.
- When a user runs the flow, the table shows all the transactions for the financial account that the user selects.
- Waive Fees

Select the transaction to waive.

DESCRIPTION	AMOUNT	TRANSACTION DATE
<input checked="" type="radio"/> Card fee	\$16.00	Jun 14, 2019
<input type="radio"/> Misc. charges	\$23.00	Jun 11, 2019

PreviousNext
- 309

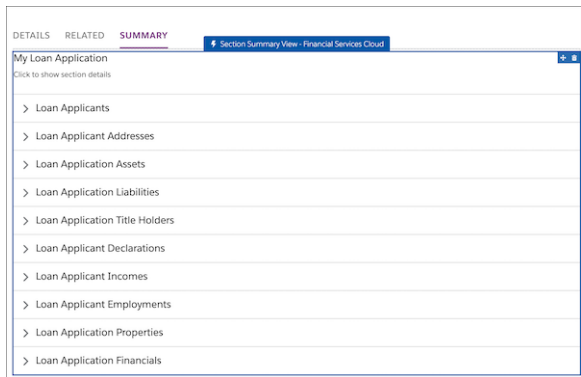
SEE ALSO:

[Flow Screen Components Provided in Financial Services Cloud](#)

[Provided Flow Screen Components](#)

Flow Screen Input Component: Section Summary View

Displays selected mortgage objects based on the Unified Residential Loan Application (URLA). All objects in the collections variable for the Section Summary component must be API names of Mortgage objects.



EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


Establish the access mode (read only, view/edit) for section records.

Select which sections to display and the order in which they are presented in the Section Summary panel.

For information about adding screen components to your flow screen, see [Flow Element: Screen](#).

 **Note:** This screen component requires [Lightning runtime](#).

Configure the Section Summary View Component

Attribute	Description
API Name	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.
Choice Labels	Add a text collection variable containing choice labels to this component.  Note: You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.
Label	User-friendly text that displays above the component.
Required	Requires users to select a value before they can move to the next screen.

Attribute	Description
Selected Value	A variable containing default choice value.

Store the Section Summary View Component in the Flow

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.

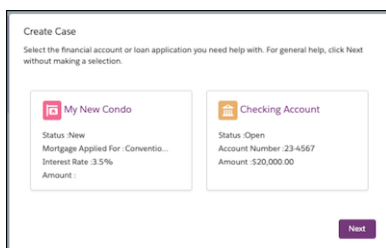
To store the user's action, map the Selected Values attribute to a variable. This collection variable contains the API names of the summary sections to display to the flow user at run time.



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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

Flow Screen Input Component: Button Picklist from Account ID

Displays relevant information about all residential loan application and financial account records associated with the account ID of the logged in user in a button picklist. If the flow user selects a financial account, the control sets the case record to the associated financial account ID.



EDITIONS

Financial Services Cloud is available in Lightning Experience.


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

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 Account ID Component

Attribute	Description
API Name	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.
Choice Labels	Add a text collection variable containing choice labels to this component.  Note: You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.
Label	User-friendly text that displays above the component.

Attribute	Description
Required	Requires users to select a value before they can move to the next screen.
Selected Value	A variable containing default choice value.

Store the Button Picklist from Account ID Component in the Flow

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 Values 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. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

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.



Note: 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.



Tip: Sometimes, the side panel displays an individual's name twice. The Add icon appears next to both, with no indication that one is the account record while the other is the contact record. Instruct your users to select the name on top, to properly associate the item with the contact part of the individual.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

SEE ALSO:

[Market to Your Customers with Pardot](#)

[Person Account Syncing with Salesforce](#)

Financial Services Cloud in the Salesforce Mobile App

Boost user productivity by including Financial Services Cloud features in the Salesforce Mobile App.

Let mobile users access Financial Services Cloud features by setting up a home page, customizing actions and navigation menus, and adding Financial Service Cloud components to the Salesforce Mobile App.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

[Set Up a Mobile Home Page](#)

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

[Mobile-Enabled Financial Services Cloud Components](#)

Give Salesforce Mobile users access to the Financial Services Cloud components that they need to stay productive away from their desks.

[Add Financial Services Cloud Components to Salesforce Mobile](#)

Help users be more productive by adding Financial Services Cloud Lightning Components to the Salesforce Mobile app.


Set Up a Mobile Home Page

Boost users' productivity on the go by setting up a Financial Services Cloud home page for the Salesforce mobile 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**.
3. Select **App Page** and click **Next**.
4. Enter a label, such as *Mobile Home*.
5. Select the **One Region** 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**.
8. Save the page.
9. Click **Activation**.
10. On the MOBILE NAVIGATION tab, add your home page to the mobile navigation menu.
11. 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 **New Salesforce Mobile App QuickStart**.
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
- 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.
14. Click **Next** and **Finish**.

SEE ALSO:

[What's Different or Not Available in the Salesforce Mobile 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.
 - **Clone**
 - **Delete**
 - **Edit**
4. Save your changes.
5. Repeat these steps for each custom object's page layout, as needed.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Mobile-Enabled Financial Services Cloud Components

Give Salesforce Mobile users access to the Financial Services Cloud components that they need to stay productive away from their desks. The following Financial Services Cloud components can be added to and used within the Salesforce Mobile app.

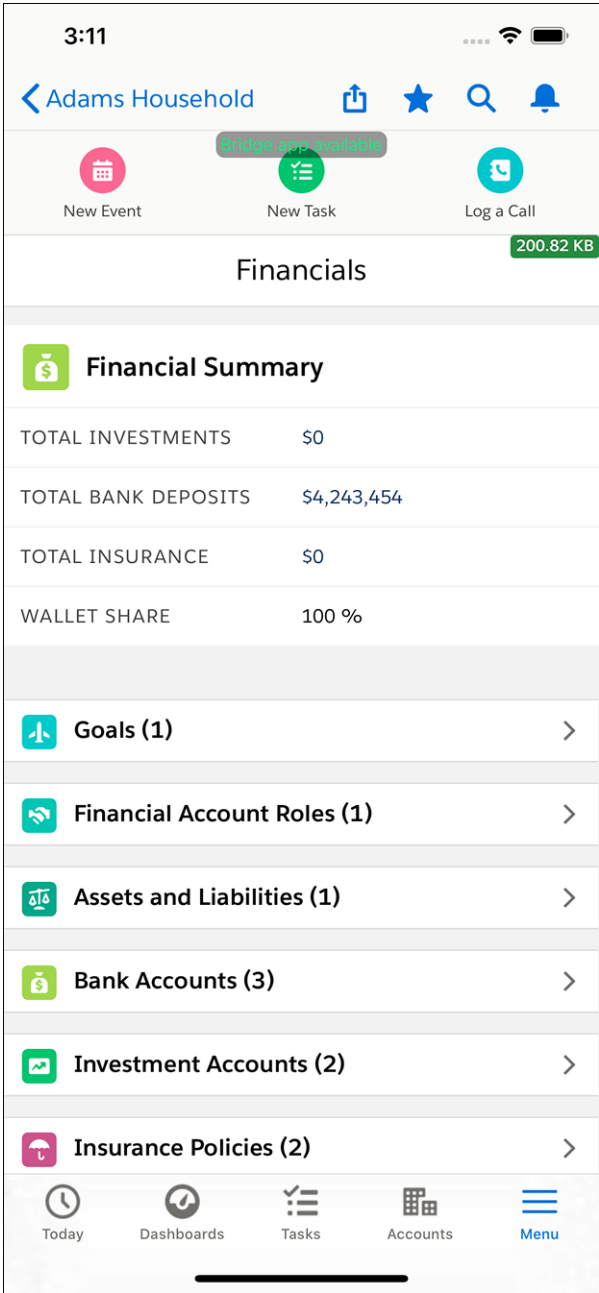


Table 24: Mobile-Enabled Components

Component	Description
Action Plan	View action plans and task items.

Component	Description
Assets and Liabilities	View, edit, and create Assets and Liabilities records for all kinds of accounts.
Bank Account	View, edit, and create Bank Account records for all kinds of accounts.
Client Record Detail	View Client Record Detail for all kinds of accounts.
Financial Account Alert	Display an alert message on a financial account page.
Financial Account List	Show a related list of financial accounts on an account page.
Financial Account Role	View, edit, and create Financial Account Roles for all kinds of accounts.
Financial Account Role List	Show a related list of financial account roles on an account page.
Financial Goal	View Financial Goals for Household and Person accounts. Edit and create Financial Goals for Household accounts only.
Financial Summary	View Financial Summary information for all kinds of accounts.
Group Members	Show a related list of group members and rollup totals on a group-enabled account page.
Group Members (Configurable)	Show a related list of group members and rollup totals on a group-enabled account page. Can be configured to show fields for those members based on a given field set.
Insurance Policy	View, edit, and create Insurance Policy records for all kinds of accounts.
Interaction Summaries	View, edit, create, or search interaction summaries.
Investment Account	View, edit, and create Investment Accounts for all kinds of accounts.
Related Accounts	View Related Accounts for all kinds of accounts. Edit and create Related Accounts for Households and Business Accounts only.
Related Contacts	View Related Contacts for Households and Business Accounts only.
Relationship Group List	List the relationship groups that an account, contact, or individual belongs to.

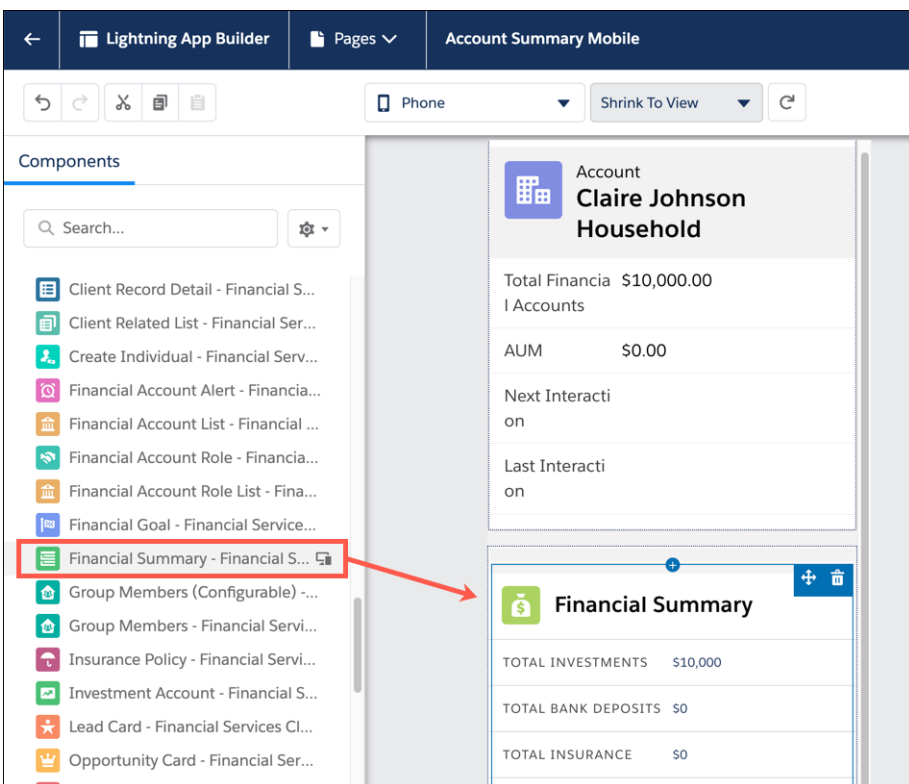
Add Financial Services Cloud Components to Salesforce Mobile

Help users be more productive by adding Financial Services Cloud Lightning Components to the Salesforce Mobile app.

First, enable a page in your app for the Phone form factor so that page can appear on mobile devices. Then use Lightning App Builder to add Financial Services Cloud components to the mobile-enabled page.

1. From **Setup**, enter *Lightning App Builder* in the Quick Find box, and then select **Lightning App Builder**.
2. Click **New**.
3. Select **Record Page** and click **Next**.
4. Enter a Label for the record page, such as *AccountSummaryMobile*.
5. From the Object dropdown, select an object for the page, such as **Account**, and click **Next**.
6. From the list of page templates choose one that supports the Phone form factor, such as **Grouped Header and One Region**, and click **Finish**.

7. To add Financial Services Cloud components to your mobile app page, drag them from the left-hand Components list into the empty regions on the page. A small icon appears next to a component name to indicate whether the component works with the desktop or phone form factor, or both.
8. For example, drag the **Highlights Panel** component into the empty region that says, “Add Component(s) to Grouped Header Region Here”. Then drag the component named **Financial Summary - Financial Services Cloud** into the lower region.



9. After a component has been placed in a page region, click the component to see or change its properties in the right-hand side panel.
10. Click **Save** when you're done editing your page.
11. After a page is saved, it must be activated before users can see it in the app. For more information about activating and previewing Salesforce mobile apps, see [Preview Mobile App Pages in Lightning App Builder](#).

SEE ALSO:

[Salesforce Help: Create a Mobile App Page with the Lightning App Builder](#)

[Salesforce Help: How Page Layouts Work in the Salesforce Mobile App](#)

WORK WITH DATA

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.

[Display Detailed Error Messages to Users](#)

Expedite debugging for your users with detailed error messages that provide insight into field-level security restrictions.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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:

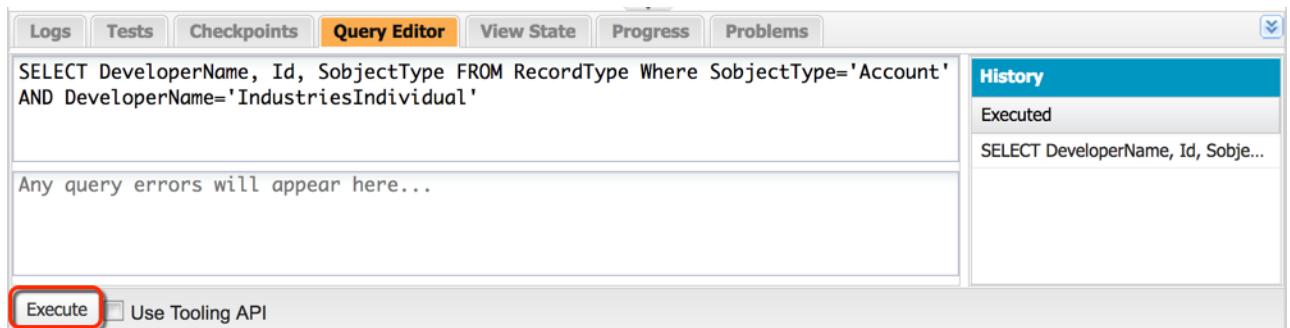
- Ensure that you've identified all the picklist values in use for each object so that you load valid values for picklist or multi-select picklist fields.
 - Run the latest version of Data Loader, which is always available in Salesforce.
1. In Developer Console, look up the `Id` for the Account object 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, SubjectType FROM RecordType Where SubjectType='Account' AND DeveloperName='<record type ID>'.`



- d. **Execute** the query.
- e. From the query results, copy the `Id` from the record.

SELECT DeveloperName, Id, SubjectType FROM RecordType Where SubjectType='Account' AND DeveloperName='IndustriesIndividual'		
Query Results - Total Rows: 1		
DeveloperName	Id	SubjectType
IndustriesIndividual	012f4000000USskAAG	Account
Query Grid: Save Rows Insert Row Delete Row Refresh Grid		
Access in Salesforce: Create New Open Detail Page Edit Page		

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`.


EDITIONS

Financial Services Cloud is available in Lightning Experience.

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


- 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.
 - a. 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

- LastActivityDate
- LastViewedDate
- LastReferencedDate
- FinServ__LengthOfEmployment__c

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, SubjectType FROM RecordType Where SubjectType='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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 `Activities & Objects to Roll Up` 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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 of 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.
7. In Data Loader, export the FinancialAccount object to a CSV file.
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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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 `fscwmmmain__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`

- `LastModifiedDate`
- `LastModifiedById`
- `SystemModStamp`
- `LastActivityDate`
- `LastViewedDate`
- `LastReferencedDate`

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`
- `LastModifiedDate`
- `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.

b. In Data Loader, export the Financial Account Transaction object to a CSV file.

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.

Display Detailed Error Messages to Users

Expedite debugging for 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, in the Quick Find box, enter *Custom Settings*, 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.

FINANCIAL SERVICES CLOUD AVAILABILITY AND LIMITATIONS

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Supported Browsers

Financial Services Cloud is available in any of the [Supported Browsers for Lightning Experience](#).

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

 **Note:** These limitations apply to person accounts and the individual object model.

- 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.
- 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.

Financial Services Cloud Availability and Limitations

- 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), Swedish, Hebrew, 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.
- 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 Mobile 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 App Limitations

A Tableau CRM Growth, Tableau CRM Plus, or Tableau CRM for Financial Services license is required to access full Tableau CRM capabilities. Consult the chart to see limitations.

Table 25: Client Segmentation App Limitations

Capability	Tableau CRM Growth or Plus; Tableau CRM for Financial Services	Client Segmentation App
Data sources	Salesforce and external data	Salesforce data
Object support	Standard and custom objects	Standard and custom objects
Data volume	<ul style="list-style-type: none"> Tableau CRM Plus: 10 billion rows Tableau CRM Growth: 100 million rows 	10 million rows
Can customize existing dashboards?	Yes	No
Can create dashboards?	Yes	No
Can customize existing datasets?	Yes	No
Can create datasets?	Yes	No
Can create custom Tableau CRM apps?	Yes	No
Supports Einstein Discovery and Community Cloud integration?	Yes	No
Supports bulk actions and APEX steps?	Yes	No
Supports Sales Cloud Einstein artificial intelligence?	No	No
Supports Salesforce Inbox?	No	No

Tableau CRM for Financial Services gives you the same access to Tableau CRM capabilities as the Tableau CRM Growth and Plus licenses. Consult this chart to see any limitations.

Table 26: Tableau CRM for Financial Services Limitations

Capability	Tableau CRM Growth or Plus; Tableau CRM for Financial Services
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	<ul style="list-style-type: none"> Tableau CRM Plus: 10 billion rows Tableau CRM Growth: 100 million rows
Can customize existing dashboards?	Yes
Can create dashboards?	Yes

Capability	Tableau CRM Growth or Plus; Tableau CRM for Financial Services
Can customize existing datasets?	Yes
Can create datasets?	Yes
Can create custom Tableau CRM apps?	Yes
Supports Einstein Discovery and Community Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein artificial intelligence?	No
Supports Salesforce Inbox?	No

Communities Limitations

- Partner Communities, Customer Communities Plus (CCP), or Customer Communities licenses required. Community Cloud license restrictions and limitations apply.
- For advanced sharing use cases (for example, sharing financial account records across multiple owners), Partner Communities or CCP licenses are required.
- 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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