Financial Services Cloud Installation Guide

Salesforce, Winter '21

@salesforcedocs
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CONTENTS

GET READY TO USE FINANCIAL SERVICES CLOUD

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Pre-Installation Tasks for Accounts and User Profiles

Before installing Financial Services Cloud, set up accounts and the user profiles.

EDITIONS

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Enable the Contacts to Multiple Accounts Feature

The Contacts to Multiple Accounts feature must be enabled to support the Financial Services Cloud data model.

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1. From Setup, enter `Account Settings` in the Quick Find box, and then select **Account Settings**.
2. Select Allow users to relate a contact to multiple accounts.

Create the User Profiles

You use profiles to grant advisors, personal bankers, and relationship managers access to Financial Services Cloud features. To create the required profiles, clone and customize the Standard User profile provided by Salesforce.

When you install the Financial Services Cloud packages, map these cloned profiles to the Advisor, Personal Banker, and Relationship Manager profiles provided in each package.

1. From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
2. Clone the Standard User profile.
3. Give it a name, such as `Advisor`.
4. Save your changes.
5. Repeat to create the Personal Banker and Relationship Manager profiles.

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Pre-Installation Tasks for Lightning Experience

Financial Services Cloud requires Lightning Experience. Configure Lightning Experience before installing the Financial Services Cloud packages.

1. Configure My Domain

   To access Financial Services Cloud, you must have My Domain enabled. With My Domain, you specify a customer-specific name to include in your Salesforce org URLs and register it with Salesforce domain registries worldwide. You can also customize your login page and better manage user login and authentication.

2. Enable Lightning Experience

   To use Financial Services Cloud, Lightning Experience must be enabled in your org. Financial Services Cloud is supported only in Lightning Experience.

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Configure My Domain

To access Financial Services Cloud, you must have My Domain enabled. With My Domain, you specify a customer-specific name to include in your Salesforce org URLs and register it with Salesforce domain registries worldwide. You can also customize your login page and better manage user login and authentication.

1. Set Up My Domain. Choose or change your My Domain name, then update your org to use your new URLs.

   Note: Production orgs created in Winter '21 and later have a My Domain by default. If you don't like your org's My Domain name, you can change it.

2. Configure My Domain Settings. Determine the user experience when logging into your Salesforce org via your My Domain. Manage user logins and authentication methods and customize your login page with your brand.

EDITIONS

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USER PERMISSIONS

To set up My Domain:
- Customize Application

Enable Lightning Experience

To use Financial Services Cloud, Lightning Experience must be enabled in your org. Financial Services Cloud is supported only in Lightning Experience.

1. From Setup, click **Get Started** in the Migration Assistant tile at the top of the menu.
2. Choose which features to enable. Consider enabling the recommended supporting features.

   Tip: Duplicate management is supported for person accounts in Financial Services Cloud.

3. Enable Lightning Experience.
4. Click **Finish Enabling Lightning Experience**.
5. In the dropdown below your Salesforce username, click **Switch to Lightning Experience**.

   Unless noted otherwise, the remaining steps in this guide are provided for Lightning Experience.

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FINANCIAL SERVICES CLOUD PACKAGES

Financial Services Cloud functionality is available from two packages. The managed package delivers most of the features, and the unmanaged extension package provides the field sets.

Note: The URLs for the Financial Services Cloud packages are in the Product Specific Terms section of your order form.

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Install the Managed Package

The managed package contains most of the Financial Services Cloud functionality. This functionality includes custom fields and objects, list views and profiles of clients and households, and administrative configurations.

Install the Unmanaged Extension Packages

Install the unmanaged extension packages after you have installed the Financial Services Cloud managed package. The unmanaged extension package provides field sets that configure how fields display in the client and household profiles. The unmanaged referral package provides the retail banking dashboard. The unmanaged commercial banking extension package provides the commercial banking dashboard.

Install the Managed Package

The managed package contains most of the Financial Services Cloud functionality. This functionality includes custom fields and objects, list views and profiles of clients and households, and administrative configurations.

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1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Cloud managed 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 profiles that you created in the pre-installation tasks to the package profiles.

   For the Advisor profile, set the access level to **Advisor**. For the Personal Banker profile, set the access level to **Personal Banker**. For the Relationship Manager profile, set the access level to **Relationship Manager**.

6. Click **Install**.

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

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

Install the Unmanaged Extension Packages

Install the unmanaged extension packages after you have installed the Financial Services Cloud managed package. The unmanaged extension package provides field sets that configure how fields display in the client and household profiles. The unmanaged referral package provides the retail banking dashboard. The unmanaged commercial banking extension package provides the commercial banking dashboard.

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1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services 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 profiles that you created in the pre-installation tasks to the package profiles.

   For the Advisor, Personal Banker, and Relationship Manager profiles, 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.
7. Repeat the steps for the unmanaged referral package and unmanaged commercial banking extension package.

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

POST-INSTALLATION TASKS

After you've installed the managed and unmanaged packages, complete these Financial Services Cloud setup and configuration tasks.

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Configure Navigation to Individual and Group Profiles

Standard URLs that point to account and contact detail pages require a different navigation path for an individual's information. When users interact with detail page links, you want them to navigate to an individual or group profile, not the individual's account or contact record. You can configure overrides to redirect these URLs.

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1. From Setup, open **Object Manager**, open **Contact**, and click **Buttons, Links, and Actions**.
2. Next to View, select **Edit**.

3. Under Salesforce Classic Override, select **Visualforce Page**, and then select **ContactDetailRedirect [FinServ_ContactDetailRedirect]** from the dropdown.
4. Save your changes.

Lightning Pages Setup

Give users the most important information about their books of business.

1. Assign a Home Page Layout to a Profile
   Financial Services Cloud home pages to show the details needed by each user profile.
2. 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.

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Assign a Home Page Layout to a Profile

Financial Services Cloud home pages to show the details needed by each user profile.

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

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 that you want to assign as a home page, as shown in the table.
3. Click **Activation**.
4. Select **Assign this Home page to specific profiles**, and then click **Next**.
5. Select the profile as per the table and click **Next**.
6. Review and save your changes.

Lightning Page Name	Profile
Home	System Administrator, Advisor
Banking Home Page	Personal Banker
Commercial Banking Home Page	Relationship Manager

Assign Lightning Pages to Display Financial Services Cloud Data

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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.

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
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

Add Values to the Lead Status Picklist

To help users track their leads, add picklist values to the Lead Status field.

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1. From Setup, open **Object Manager**, then **Lead**, and select **Fields & Relationships**.
2. Select **Lead Status**.
3. If the picklist values Working - Contacted and Nurturing - Contacted aren't present.
   a. Click **New**.
   b. For the label and API name, enter `Working - Contacted`.
   c. Save your changes.
   d. Add the Nurturing - Contacted picklist value by repeating these steps.
4. Configure the picklist values.
   a. From Setup, enter `Lead Processes` in the Quick Find box, and then select **Lead Processes**.
   b. Click **Lead process**.
   c. If they aren't present, add Unqualified, New, Working - Contacted, Nurturing - Contacted, and Qualified (Converted) from Available Values to Selected Values.
   d. If it isn't set, select **New** as the default value.
   e. Save your changes.

Add Values to the Opportunity Stage Picklist

To help users track their open client opportunities, add picklist values to the Stage field.

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1. From Setup, open **Object Manager**, open **Opportunity**, then select **Fields & Relationships**.
2. Select **Stage**.
3. Create opportunity stage picklist values that suit your business process. We suggest Assessment Needed, Develop Proposal, Client Presentation, and Initiate Transfer.
   a. From Opportunity Stages Picklist Values, click **New**.
   b. Name the stage.
   c. Enter the probability that the stage represents.

      We suggest these percentages:
      - Assessment Needed—25
      - Develop Proposal—50
      - Client Presentation—75
      - Initiate Transfer—90
   d. Save your changes.
4. Configure the sales processes.
   a. From Setup, enter `Sales Processes` in the Quick Find box, and then select **Sales Processes**.
   b. Click **Opportunity Process**.

c. Remove any existing values from Selected Values and add the stages created above.

d. Save your changes.

e. Repeat these steps for Wallet Share.

Add Users

Add the necessary User Profile permissions to enable users to manage their books of business from Financial Services Cloud, and then create users.

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1. Configure User Profile Permissions
   Enable the required permissions and a field-level security setting for the user profiles, including the System Administrator profile. You can edit profiles that you created and mapped to the packaged profiles. However, you can't change the packaged Advisor Access, Personal Banker Access, and Relationship Manager Access permission sets. If you want to add or remove permissions, clone the packaged permission and modify the new version.
2. Create Users
   Create users and assign them the required permissions so that they can access Financial Services Cloud.

Configure User Profile Permissions

Enable the required permissions and a field-level security setting for the user profiles, including the System Administrator profile. You can edit profiles that you created and mapped to the packaged profiles. However, you can't change the packaged Advisor Access, Personal Banker Access, and Relationship Manager Access permission sets. If you want to add or remove permissions, clone the packaged permission and modify the new version.

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Make edits to the profiles that you created or cloned, not to the Standard User profile. The Standard User profile doesn't have access to packaged features.

1. From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
2. Click **Advisor**:
   a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.
   b. In the Field-Level Security section, select **View** next to **Event**. Edit the event, and enable read access for the Type field.
   c. In the Record Type Setting section, verify the following.
      - Events defaults to Advisor Event
      - Leads defaults to Referrals
      - Opportunities defaults to Opportunity (Wallet Share)
      - Tasks defaults to Advisor Task
   d. In the Administrative Permissions section, enable these permissions.
      - View Dashboards in Public Folders
      - View Reports in Public Folders
   e. In the General User Permissions section, enable these permissions.
      - Drag-and-Drop Dashboard Builder

- Edit Case Comments
- Import Leads
- Manage Cases
- Manage Leads
- Transfer Cases
- Transfer Leads
- View My Team's Dashboards

3. Click **Personal Banker**:
   a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.
   b. In the Record Type Setting section, verify the following.
      - In the Standard Record Type Settings subsection,
        - Leads defaults to Referrals
        - Opportunities includes the Opportunity (Wallet Share), and defaults to General
        - Task is set to Master
      - In the Custom Record Type Settings subsection, Billing Statements includes Credit and Debit, and defaults to Credit.

4. Click **System Administrator**:
   a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.
   b. In the Record Type Setting section, verify the following.
      - Events defaults to Advisor Event
      - Leads defaults to Referrals
      - Opportunities defaults to Opportunity (Wallet Share)
      - Tasks defaults to Advisor Task

Create Users

Create users and assign them the required permissions so that they can access Financial Services Cloud.

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1. Create a user.
   a. From Setup, enter `Users` in the Quick Find box, and then select **Users**.
   b. Create a user. Assign it the Salesforce user license and the Advisor, Personal Banker, or Relationship Manager profile.
   c. Save your changes.

2. Assign permission sets.
   a. Click **Permission Set Assignments**, and then click **Edit Assignments**.
   b. Under Available Permission Sets, choose the permission sets and click **Add**.
      - For users with the Personal Banker profile, add the Financial Services Cloud Standard and Personal Banker Access permission sets.

- For users with the Advisor profile, add the Financial Services Cloud Standard and Advisor Access permission sets.
- For users with the Relationship Manager profile, add the Financial Services Cloud Standard and Relationship Manager Access permission sets.

c. Save your changes.

To enable user access to Einstein Analytics, see Enable a Permission Set License for Analytics Users.

Page Layouts and Global Actions Setup

Give users access to actions and related lists from accounts and contacts in Financial Services Cloud.

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1. Add Global Actions to Publisher Layouts
   A global action lets users easily record details about client tasks, events, and calls by launching an action from the Salesforce header.
2. Configure the Account Contact Relationship Page Layout
   Give relationship managers, personal bankers, and advisors access to the fields in the account contact relationship layout to let them create and maintain relationship groups.

Add Global Actions to Publisher Layouts

A global action lets users easily record details about client tasks, events, and calls by launching an action from the Salesforce header.

EDITIONS

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1. Replace the default actions available to users in the Salesforce mobile app and Lightning Experience.
   a. From Setup, enter `Global Actions` in the Quick Find box, and then select **Publisher Layouts**.
   b. Select **New**.
   c. Name the publisher layout, such as Advisor Publisher Layout.
   d. Save your changes.
   e. In the Salesforce Mobile and Lightning Experience Actions section, select the override option.
   f. Remove these actions: **New Event**, **New Task**, and **Log a Call**.
   g. In the palette, select the **Mobile & Lightning Actions** category. Drag these actions to the Salesforce Mobile and Lightning Experience Actions section. Make sure that you're dragging the correct actions by hovering over the action and checking the name.
      - **FinServ__NewEventAdvisor**
      - **FinServ__NewTaskAdvisor**
      - **FinServ__LogACallAdvisor**
   h. Save your changes.
2. Assign the Advisor Publisher Layout to the Advisor profile.
   a. From the list of Global Publisher Layouts, click **Publisher Layout Assignment**.
   b. Select **Edit Assignment**.

c. In the table:
   - Select the cell for the Advisor profile, and choose **Advisor Publisher Layout** from the dropdown list.
   - Select the cell for the Personal Banker profile, and choose **RB Global Layout** from the dropdown list.
   - Select the cell for the Relationship Manager profile, and choose **RB Global Layout** from the dropdown list.

   If you have created other profiles, assign them these layouts as needed.

d. Save your changes.

Configure the Account Contact Relationship Page Layout

Give relationship managers, personal bankers, and advisors access to the fields in the account contact relationship layout to let them create and maintain relationship groups.

1. From Setup, open **Object Manager**, then **Account Contact Relationship**, and click **Page Layouts**.
2. From the Page Layouts section, click **Page Layout Assignment**.
3. For the Advisor, Personal Banker, and Relationship Manager profiles, select **Account Contact Relationship Layout (Installed Package: WealthManagement)**.
4. Save your changes.

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Add Customer Roles

When users create a customer record, they specify the customer's role within a household, such as client, spouse, domestic partner, or dependent. These roles are picklist values for the Role field on the Account Contact Relationship object. Define the roles that represent the types of household members that your firm tracks.

1. From Setup, open **Object Manager**, open **Account Contact Relationships**, then click **Fields & Relationships**.
2. Select **Roles**.
3. Delete the standard Salesforce roles picklist values.
4. Add picklist values as needed.

   We suggest these roles:
   - Client
   - Dependent
   - Domestic Partner
   - Spouse
   - Grantor
   - Beneficiary
   - Board Member
   - Employee
   - Trustee
   - Other

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5. Save your changes.

Set Up Intelligent Need-Based Referrals and Scoring

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

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.

Components That Track Intelligent Need-Based Referrals and Scoring

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

Install Intelligent Need-Based Referrals and Scoring

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

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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.

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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

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Create a Lead Queue for Referral Approvers

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

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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.

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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**.
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.

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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

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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.

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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.

DEPLOY THE EINSTEIN ANALYTICS CLIENT SEGMENTATION APP

EDITIONS

Available in Lightning Experience in **Enterprise** and **Unlimited** editions that have Financial Services Cloud enabled.

The Client Segmentation Analytics app helps financial advisors identify key actions for high-potential clients and accounts. Deploy it after you complete the Wealth Management implementation tasks. Dashboards from the Client Segmentation Analytics app replace Financial Services Cloud embedded dashboards available on the Advisor Analytics tab.

Note: Einstein Analytics Client Segmentation App is not part of Einstein Analytics for Financial Services, which is a separate application enabled by its own license and available for extra cost.

Client Segmentation Analytics app dashboards are based on the latest Analytics dashboard designer. The older classic designer will be retired on June 30, 2019, and the Advisor Analytics tab will no longer be available in Financial Services Cloud. Customers are advised to remove the Advisor Analytics tab before then. Contact your Salesforce representative to learn more about the transition.

If you installed the Financial Services Cloud – Einstein Analytics managed package, replace it by using the Client Segmentation Analytics template. The template creates an app with dashboards that your team accesses through Einstein Analytics.

Before deploying the Client Segmentation Analytics app, review the following considerations.

- Client Segmentation Analytics is available only in English. Localization is not supported.
- All users see the same date, time, and number formats, regardless of their locale and language settings.
- Multicurrency is not supported. When Financial Services Cloud extracts your org's default currency, it uses the currency for monetary values and doesn't convert to another currency. Labels with the `'$'` symbol are not converted to reflect the default currency.

Tip: Follow the steps in the order shown to deploy the Einstein Analytics Client Segmentation App app.

Enable Einstein Analytics

Before creating the Client Segmentation Analytics app, enable Analytics in your Salesforce org.

Assign Client Segmentation Analytics App Administrator Permissions

Enable administrators to create an app from the Client Segmentation Analytics template and manage it by assigning the Client Segmentation Admin permission set.

Assign Client Segmentation Analytics App User Permissions

Enable users to view the Client Segmentation Analytics app by assigning the Client Segmentation Analytics User permission set.

Get Your Data Ready to Create the Client Segmentation Analytics App

Data in your org has to meet specific requirements before you can create the Client Segmentation Analytics app.

Set Field-Level Security to Enable Creation of the Client Segmentation Analytics App

Before creating the Client Segmentation Analytics app, make sure the Analytics Integration User has access to all fields used in the app.

Create and Share an App from the Client Segmentation Analytics Template

Follow these steps to create and share an app from the Client Segmentation Analytics template.

Schedule the Data Synch and Dataflow for the Client Segmentation Analytics App

When you create the app, the creation process includes a data sync and a dataflow that imports the latest data to Analytics. Schedule the sync and dataflow to be rerun every day to ensure that Client Segmentation Analytics uses up-to-date data.

Understand Client Segmentation Analytics Limitations

The Client Segmentation Analytics app gives you limited access to Salesforce Einstein Analytics capabilities and features.

SEE ALSO:

Use Financial Services Cloud Einstein Analytics Solutions

Personalize the Navigation Bar in Lightning Experience

Enable Einstein Analytics

Before creating the Client Segmentation Analytics app, enable Analytics in your Salesforce org.

Note: If you see a blue **Launch Analytics** button in the upper right corner, Analytics is already enabled and you can skip to "Assign Client Segmentation Analytics App Administrator Permissions".

1. From Setup, enter `Getting Started` in the Quick Find box, and then select **Getting Started**.
2. Click **Enable Einstein Analytics**.

SEE ALSO:

Assign Client Segmentation Analytics App Administrator Permissions

Assign Client Segmentation Analytics App Administrator Permissions

Enable administrators to create an app from the Client Segmentation Analytics template and manage it by assigning the Client Segmentation Admin permission set.

1. From Setup, enter `Users` in the Quick Find box, and then select **Users**.
2. Click the user name with the System Administrator profile.
3. Click **Permission Set Assignments**, and then click **Edit Assignments**.
4. Select the Client Segmentation Admin permission set.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to create and manage the Client Segmentation Analytics app.

Assign Client Segmentation Analytics App User Permissions

Enable users to view the Client Segmentation Analytics app by assigning the Client Segmentation Analytics User permission set.

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 the Client Segmentation Analytics app.
3. Click **Permission Set Assignments**, and then click **Edit Assignments**.
4. Select the Client Segmentation Analytics User permission set.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to view the Client Segmentation Analytics app.

Get Your Data Ready to Create the Client Segmentation Analytics App

Data in your org has to meet specific requirements before you can create the Client Segmentation Analytics app.

Your org must have at least the following data:

- One record in the FinancialAccount object
- Record types

During app creation, Analytics checks your org's data to be sure it meets minimum requirements. If it doesn't, you see a message describing what needs to be fixed.

Set Field-Level Security to Enable Creation of the Client Segmentation Analytics App

Before creating the Client Segmentation Analytics app, 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.

You can now create the Client Segmentation Analytics app.

Create and Share an App from the Client Segmentation Analytics Template

Follow these steps to create and share an app from the Client Segmentation Analytics template.

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

3. Select **Client Segmentation Analytics**. Then click **Continue**.
4. Analytics performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again.
5. Name your app and click **Create**.
6. 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: If you see an error saying the Analytics Integration User does not have access to selected fields, 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 Client Segmentation Analytics admin or user permission sets.

1. Open your app if it's not already open. If you've navigated away from Analytics 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.
5. Click **Add**, then click **Save**.

SEE ALSO:

Set Field-Level Security to Enable Creation of the Client Segmentation Analytics App

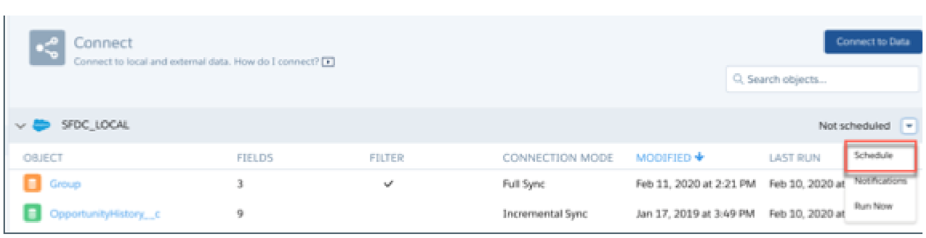
Schedule the Data Synch and Dataflow for the Client Segmentation Analytics App

When you create the app, the creation process includes a data sync and a dataflow that imports the latest data to Analytics. Schedule the sync and dataflow to be rerun every day to ensure that Client Segmentation Analytics uses up-to-date data.

1. In 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. First, schedule the sync. Select the **Connect** tab on the left.

   Note: If you can't see the Connect tab, you need to enable data sync in your org. See Enable Data Sync and Connections.

3. Click 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 dataflow. Select the **Dataflows & Recipes** tab on the left.
6. Look for the name of your app, and click the triangle to the far right.
7. Select **Schedule**, then check the box next to **Event-based**. You see a message telling you that the dataflow runs after the data sync—exactly what you want.
8. Click **Save**.

The sync and dataflow for your app now runs ever day at the time you set.

Understand Client Segmentation Analytics Limitations

The Client Segmentation Analytics app gives you limited access to Salesforce Einstein Analytics capabilities and features.

An Einstein Analytics Growth, Einstein Analytics Plus, or Einstein Analytics for Financial Services license is required to access full Einstein Analytics capabilities. Consult the chart to see limitations.

Table 1: Client Segmentation Analytics Limitations

Capability	Einstein Analytics Growth or Plus; Einstein Analytics for Financial Services	Client Segmentation Analytics
Data sources	Salesforce and external data	Salesforce data
Object support	Standard and custom objects	Standard and custom objects
Data volume	• Einstein Analytics Plus: 10 billion rows • Einstein Analytics 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 Analytics 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

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