Financial Services Cloud Installation Guide

Salesforce, Winter ’19

@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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1. Enable the Contacts to Multiple Accounts Feature

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

2. 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.

Enable the Contacts to Multiple Accounts Feature

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

EDITIONS

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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. Register a My Domain Subdomain

   To access Financial Services Cloud, you must have My Domain enabled. Register a subdomain with the My Domain wizard and then deploy it.

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Register a My Domain Subdomain

To access Financial Services Cloud, you must have My Domain enabled. Register a subdomain with the My Domain wizard and then deploy it.

1. From Setup, enter *`My Domain`* in the Quick Find box, and then select **My Domain**.
2. Enter the subdomain name you want to use.

   The subdomain appears in your firm's login URL as `https://`*`subdomain`*`.my.salesforce.com`.

   Your subdomain can't contain these reserved words:

   - www
   - salesforce
   - heroku

   And, you can't start the domain name with:

   - root
   - status

3. Click **Check Availability**. If your name is already taken, choose a different one.

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4. Click **Register Domain**.

   To check the registration status, refresh the page or wait for the confirmation email. It can take up to 3 minutes.

   After registration is confirmed, your domain is ready for testing and deployment.

5. Click **Log In**.
6. (Optional) Register your mobile phone.
7. If you land on the Salesforce home page, return to **My Domain** in Setup.
8. Click **Deploy to Users**, and confirm that you want to permanently deploy the custom domain to users.

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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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.

   Important: Financial Services Cloud doesn't support duplicate management. Enabling this feature isn't recommended.

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

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

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.

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

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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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

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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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.

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.

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Add Values to the Opportunity Stage Picklist

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

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**.

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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.

EDITIONS

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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.

EDITIONS

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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. Use Process Builder flows 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 Builder Flow

Optionally, use a Process Builder flow 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:

Dashboard Limits, Limitations, and Allocations

Enable the Referrer Score

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

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

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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.

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.

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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.

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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 Builder Flow

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

Create a process flow that meets your organization'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.

EINSTEIN ANALYTICS FOR FINANCIAL SERVICES CLOUD

Einstein Analytics for Financial Services Cloud is a Financial Services Cloud app that you can install after you complete the Wealth Management implementation tasks. Einstein Analytics for Financial Services Cloud includes embedded dashboards that help advisors analyze financial accounts and securities, learn how client interactions impact their revenue, and more.

EDITIONS

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Before configuring Einstein Analytics for Financial Services Cloud, review the following considerations.

- Einstein Analytics for Financial Services Cloud 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.

Get Ready to Use Einstein Analytics for Financial Services Cloud

In the org where you are installing Einstein Analytics for Financial Services Cloud, perform these prerequisite tasks.

EDITIONS

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

Set Up the Analytics Cloud Integration User Profile
You can specify which users have read and edit access to Salesforce data.

Configure the Role Hierarchy
Set up the role hierarchy for Einstein Analytics for Financial Services Cloud so that the integration user can apply role-based security.

SEE ALSO:

Financial Services Cloud Availability and Limitations

Enable Analytics

EDITIONS

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

You must complete all Wealth Management implementation tasks before starting the Einstein Analytics for Financial Services Cloud implementation. To start configuring Einstein Analytics for Financial Services Cloud, enable Analytics.

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

Give Users Access to Einstein Analytics for Financial Services Cloud

EDITIONS

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

You give users access by enabling the Analytics permission set license.

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 License Assignments**, and then click **Edit Assignments**.
4. Select the **Analytics Embedded App** permission set license.
5. Save your changes.
6. Repeat these steps for all users who need access to Einstein Analytics for Financial Services Cloud.

Create a Permission Set for the FSC Analytics Admin

EDITIONS

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

Create a permission set to assign to the System Administrator user so they can take on the role of FSC Analytics Admin.

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **New**.
3. Provide the following information.
   - For Label, enter FSC Analytics Admin.
   - For API Name, accept the default.
   - For Description, give users full access to manage Einstein Analytics for Financial Services Cloud.
   - For Session Activation Required, do not select.
4. For License, select **None**.
5. Save your changes.
6. On the FSC Analytics Admin permission set page, click **System Permissions**.

7. Click **Edit**, and then select **Manage Analytics**.
8. Save your changes.

Assign the FSC Analytics Admin Permission Set

Assign the FSC Analytics Admin permission set to give the System Administrator access to all Einstein Analytics for Financial Services Cloud functionality.

EDITIONS

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

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **FSC Analytics Admin**, and then click **Manage Assignments**.
3. Click **Add Assignments**.
4. Select **User, Admin**.
5. Click **Assign**, and then click **Done**.

Set Up the Analytics Cloud Integration User Profile

You can specify which users have read and edit access to Salesforce data.

EDITIONS

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

1. From Setup, enter `Profile` in the Quick Find box, and then select **Profiles**.
2. Click **Analytics Cloud Integration User**.
3. In the Field-Level Security section, next to Task, click **View**.
4. Click **Edit**.
5. For Type, select **Read Access** and **Edit Access**.
6. Save your changes.

Configure the Role Hierarchy

Set up the role hierarchy for Einstein Analytics for Financial Services Cloud so that the integration user can apply role-based security.

EDITIONS

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

1. From Setup, enter `Role` in the Quick Find box, and then select **Roles**.
2. Click **Set Up Roles**, and then click **Add Role**.
3. Set up the CEO role using the label `CEO`.
4. Save your changes, and return to the Roles list.
5. Under CEO, click **Add Role**.
6. For Label, enter `Financial Services Cloud Integration`.
7. Confirm **This role reports to** is **CEO**.
8. Save your changes.
9. Click **Assign Users to Role**.
10. For Available Users Search, select **All Unassigned**.
11. From the All Unassigned Active box, add **Integration User** to Selected Users for Financial Services Cloud Integration.
12. Save your changes.

Install Financial Services Cloud - Einstein Analytics

To use the embedded Financial Services Cloud dashboards in Financial Services Cloud, install the Financial Services Cloud - Einstein Analytics managed package.

EDITIONS

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

1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Cloud - Einstein Analytics managed package.
2. Paste the URL into your browser navigation bar and press Enter.
3. Enter your Salesforce admin password.
4. Select **Install for Admins only**, and then click **Install**.

   If the install takes a while, you can select **Done** and the installation finishes 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?

Post-Installation Tasks

After you've installed the Financial Services Cloud - Einstein Analytics package, complete these tasks.

EDITIONS

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

Configure the FSC Analytics Admin Permissions
The FSC Analytics Admin permission gives the Financial Services Cloud admin access to the Advisor Analytics tab. Then configure the permission set so that the admin can assign the View All permission.

Create a Permission Set for the FSC Analytics Advisor
Use a permission set to specify the access provided to the Financial Services Cloud advisor user.

Enable the Advisor Analytics Tab for FSC Analytics Advisors
The Advisor Analytics tab gives advisors access to Advisor Analytics from Financial Services Cloud.

Assign the FSC Analytics Advisor Permission Set
The FSC Analytics Advisor permission set gives Financial Services Cloud advisors access to Einstein Analytics for Financial Services Cloud functionality.

Assign the FSC Analytics Integration Permission Set
To give Einstein Analytics for Financial Services Cloud access to all your Salesforce data, assign the FSC Analytics Integration permission set to the integration user.

Enable Field-Level Security for the Analytics Cloud Security User
The Analytics Cloud Security User profile needs read access on the FSC Analytics Permissions field to apply the view all permissions.

Assign View All Permissions to the FSC Analytics Admin
By default, users can view data in Einstein Analytics for Financial Services Cloud only if they own records or through a role hierarchy configuration. If needed, you can give Financial Services Cloud admins View All permissions to view data in Financial Services Cloud.

Set Up the Navigation Bar for Advisor Analytics
You can add the Advisor Analytics tab to the navigation bar to give advisors easy access to Financial Services Analytics.

Enable View Access for all Salesforce Users
Salesforce users who are assigned an FSC Analytics permission set can access Einstein Analytics for Financial Services Cloud.

Schedule Data Refreshes in Einstein Analytics
To take advantage of Einstein Analytics for Financial Services Cloud, schedule a daily refresh of your data.

Confirm Field-Level Security
If your dataflow is failing, confirm that the object fields have the appropriate field-level security so that Einstein Analytics for Financial Services Cloud can access your Salesforce data.

Configure the FSC Analytics Admin Permissions

EDITIONS

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

The FSC Analytics Admin permission gives the Financial Services Cloud admin access to the Advisor Analytics tab. Then configure the permission set so that the admin can assign the View All permission.

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **FSC Analytics Admin**.
3. Under Apps, click **Object Settings**.
4. Click **Advisor Analytics**, and then click **Edit**.
5. Select the **Available** and **Visible** columns.
6. Save your changes.
7. Click **Object Settings**.
8. Click **Users**, and then click **Edit**.
9. Select the **Read Access** and **Edit Access** columns.
10. Save your changes.

Create a Permission Set for the FSC Analytics Advisor

EDITIONS

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

Use a permission set to specify the access provided to the Financial Services Cloud advisor user.

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **New**.
3. Provide the following information.
   - For Label, enter `FSC Analytics Advisor`.
   - For API Name, accept the default.
   - For Description, enter `Give advisors read permissions to access Einstein Analytics for Financial Services Cloud`.
   - For Session Activation Required, do not select.
4. For License, select **None**.
5. Save your changes.
6. On the FSC Analytics Advisor page, under System, click **System Permissions**.
7. Click **Edit**, and select **Download Analytics Data** and **Use Analytics**.
8. Save your changes.

Enable the Advisor Analytics Tab for FSC Analytics Advisors

The Advisor Analytics tab gives advisors access to Advisor Analytics from Financial Services Cloud.

EDITIONS

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

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **FSC Analytics Advisor**.
3. Under Apps, click **Object Settings**.
4. Click **Advisor Analytics**, and then click **Edit**.
5. Select the **Available** and **Visible** columns.
6. Save your changes.

Assign the FSC Analytics Advisor Permission Set

The FSC Analytics Advisor permission set gives Financial Services Cloud advisors access to Einstein Analytics for Financial Services Cloud functionality.

EDITIONS

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

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **FSC Analytics Advisor**, and then click **Manage Assignments**.
3. Click **Add Assignments**.
4. Select which users you want to give access to Einstein Analytics for Financial Services Cloud.
5. Click **Assign**, and then click **Done**.

Assign the FSC Analytics Integration Permission Set

To give Einstein Analytics for Financial Services Cloud access to all your Salesforce data, assign the FSC Analytics Integration permission set to the integration user.

EDITIONS

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

1. From Setup, enter `Permission` in the Quick Find box, and then select **Permission Sets**.
2. Click **FSC Analytics Integration**, and then click **Manage Assignments**.
3. Click **Add Assignments**.
4. Select **User, Integration**.
5. Click **Assign**, and then click **Done**.

Enable Field-Level Security for the Analytics Cloud Security User

The Analytics Cloud Security User profile needs read access on the FSC Analytics Permissions field to apply the view all permissions.

EDITIONS

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

1. From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
2. Click **Analytics Cloud Security User**.
3. In the Field-Level Security section, next to User, click **View**.
4. Click **Edit**.
5. For the FSC Analytics Permissions field, select **Read Access**.
6. Save your changes.

Assign View All Permissions to the FSC Analytics Admin

EDITIONS

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

By default, users can view data in Einstein Analytics for Financial Services Cloud only if they own records or through a role hierarchy configuration. If needed, you can give Financial Services Cloud admins View All permissions to view data in Financial Services Cloud.

1. From Setup, open **Object Manager**.
2. Click **User**.
3. In the User Page Layouts section, click **User Layout**.

   Note: If multiple layouts are listed, select the layout assigned to the System Administrator profile.

4. From the palette, drag **FSC Analytics Permissions** to the Additional Information section.

   Note: If the Additional Information section is not shown, drag a section from the Reports Charts palette to create one.

5. Save your changes.
6. From Setup, enter `Users` in the Quick Find box, and then select **Users** > **Users**.
7. Repeat the following steps for all admin users who need to view all data in Financial Services Cloud.
   a. Click the name of your Salesforce admin user, and click **Edit**.
   b. For FSC Analytics Permissions, enter `View All`.
   c. Save your changes.

Set Up the Navigation Bar for Advisor Analytics

EDITIONS

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

You can add the Advisor Analytics tab to the navigation bar to give advisors easy access to Financial Services Analytics.

1. From Setup, enter `App Manager` in the Quick Find box, and then select **App Manager**.
2. For Wealth Management, select **Edit** from the dropdown.
3. Open **Select Items**.
4. In the Available Items list, select **Advisor Analytics** and then click **Add**.
5. In the Selected Tabs list, select **Advisor Analytics** and move it under Financial Accounts.
6. In the Assign to Profiles section, next to Advisor, select the **Visible** column.
7. Save your changes.
   Refresh your browser to check that the Advisor Analytics tab appears on the Financial Services Cloud navigation bar.

Enable View Access for all Salesforce Users

EDITIONS

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

Salesforce users who are assigned an FSC Analytics permission set can access Einstein Analytics for Financial Services Cloud.

Note: Allow popups in your browser for your org domain so that the Financial Services Cloud app can open.

1. From the App Launcher menu, click **Analytics Studio**.
2. From Apps, hover over **Advisor Analytics** and click **Share** from the dropdown.

3. Next to Entire Organization, select **Viewer** from the dropdown.
4. Save your changes.

Schedule Data Refreshes in Einstein Analytics

EDITIONS

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

To take advantage of Einstein Analytics for Financial Services Cloud, schedule a daily refresh of your data.

1. From the App Launcher menu, click **Analytics Studio**.
2. From Setup ( ) within Analytics, click **Data Manager**.
3. Click the **Dataflows & Recipes** tab.
4. Next to Financial Services Cloud Dataflow, select **Schedule** from the dropdown.
5. Specify when to refresh the data.
6. Save your changes.
7. Next to Financial Services Cloud Dataflow, select **Start** from the dropdown.

   The time needed to refresh your data depends on the size of the datasets. You can check the status on the Monitor tab.

Confirm Field-Level Security

EDITIONS

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

If your dataflow is failing, confirm that the object fields have the appropriate field-level security so that Einstein Analytics for Financial Services Cloud can access your Salesforce data.

1. From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
2. Click **Analytics Cloud Integration User**.
3. In the Field-Level Security section, next to Account, click **View**.
4. Confirm that **Read Access** is selected for all fields. For fields that don't have read access enabled, click **Edit** and select **Read Access**.
5. Save your changes, and then click **Back to Profile**.
6. Confirm that the following objects also have read access.
   - Contact
   - Event
   - Financial Account
   - Financial Goal
   - Financial Holding
   - Opportunity
   - Revenue
   - Task

INDEX