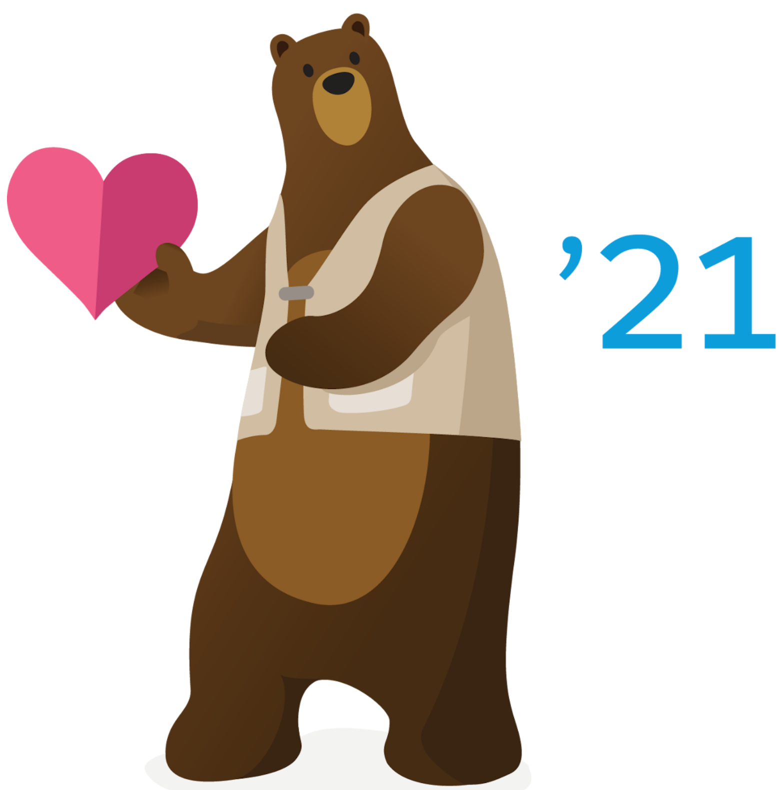
Financial Services Cloud Quick Start

Salesforce, Spring '21



@salesforcedocs

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GET READY TO USE FINANCIAL SERVICES CLOUD

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Check Whether You're Set Up for Financial Services Cloud

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

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

Great, you are ready to get started.

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

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.

SEE ALSO:

My Domain

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USER PERMISSIONS

To set up My Domain:

- Customize Application

  AND

  Modify All Data

Create Users

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

1. From Setup, enter `Users` in Quick Find, then select **Users**.
2. Create a user. Assign it the `Salesforce` user license.
3. Based on the persona of the user, assign a profile, such as System Administrator, Advisor, Personal Banker, or a custom profile. (See Create User Profiles for Other User Personas to create a custom profile.)
4. Save your changes.
5. Click **Permission Set Assignments** and then click **Edit Assignments**.
6. From Available Permission Sets, add the relevant permission sets to Enabled Permission Sets.

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

   Note: You can assign custom permission sets to provide more access, as required by the user's persona. For example, customize Advisor profile permissions to allow advisors to delete financial account role (FAR) records.

7. Save your changes.

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8. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign Einstein Analytics Client Segmentation app access permissions to Admin user.
   a. From Setup, enter `Users` in the Quick Find box, and then select **Users**.
   b. Click the username with the System Administrator profile.
   c. Click **Permission Set Assignments**, and then click **Edit Assignments**.
   d. Select the Client Segmentation Admin permission set.
   e. Click **Add**, then click **Save**.
9. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign Einstein Analytics Client Segmentation app access permissions to other users in your organization.
   a. From Setup, enter `Users` in the Quick Find box, and then select **Users**.
   b. Click the name of a user who requires access to the Client Segmentation Analytics app.
   c. Click **Permission Set Assignments**, and then click **Edit Assignments**.
   d. Select the Client Segmentation Analytics User permission set.
   e. Click **Add**, then click **Save**.
   f. Repeat these steps for all users who require access to the Client Segmentation Analytics app.

Create User Profiles for Other User Personas

Create profiles to define the permissions and field-level security settings for other users in your organization.

Start by cloning the Standard User profile.

1. From Setup, enter `Profiles` in Quick Find, then select **Profiles**.
2. Clone the Standard User profile.
3. Give the profile a name to identify the type of user, such as `Teller` or `Client Associate`.
4. Save your changes.
5. Click **Edit** to update the permissions and field-level security as needed.
6. Save your changes.
   You can now create new users based on this profile.

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Financial Services Cloud Permission Set Licenses

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

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

Schedule Data Refreshes for the Client Segmentation Analytics App

EDITIONS

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

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

1. From the App Launcher, find and open **Analytics Studio**.
2. From Setup ( ) within Analytics, click **Data Manager**.
3. Click the **Dataflows & Recipes** tab.
4. Next to the dataflow for your Analytics app, select **Schedule** from the dropdown. The dataflow uses the name you gave your app when you created it. For example, if you named your app `MyClientSegmentation`, look for the dataflow with that name.
5. Specify when to refresh the data.
6. Save your changes.
7. Next to the dataflow for your app, select **Start** from the dropdown.
   The time it takes to refresh your data depends on the size of the datasets. You can check the status on the Monitor tab.
8. Repeat the above steps for all the Analytics apps you create.

SEE ALSO:

Analytics Glossary