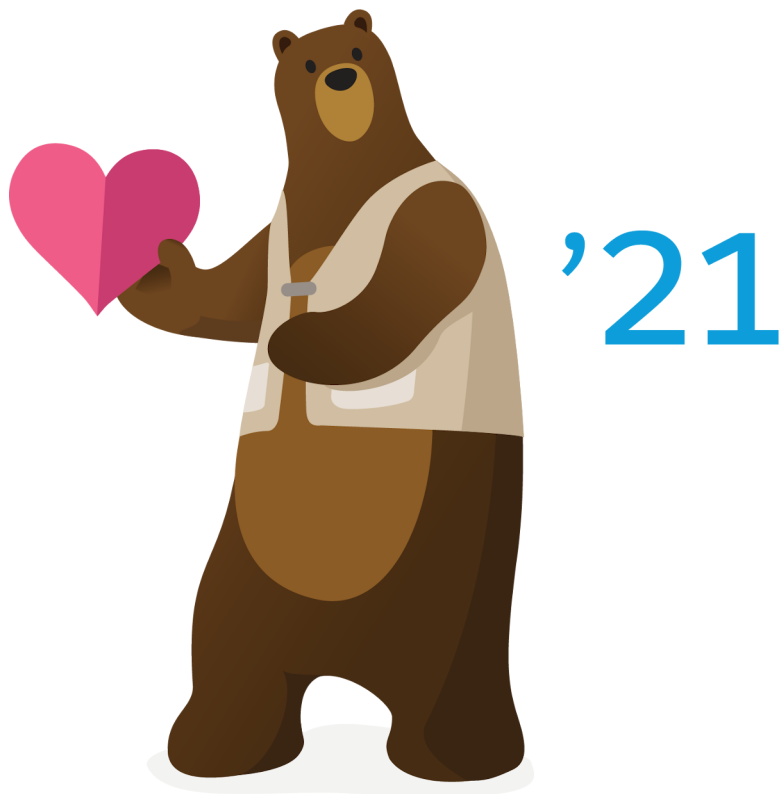




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# Financial Services Cloud Upgrade Guide

Salesforce, Spring '21






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# POST-UPGRADE TASKS

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

 **Important:** You can add processes or record types for Lead and Opportunity objects, but the packaged processes and record types must remain active for the upgrade. Optionally, you can remove them from the respective profiles.

## Capture and Share Interaction Summaries

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

## Insurance for Financial Services Cloud

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

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

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

### EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

## Capture and Share Interaction Summaries

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

## Enable and Configure Interaction Summaries

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

### EDITIONS

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

### Configure Sharing Settings for Interaction Summaries

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

### Work with Interaction Summaries

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

## Enable and Configure Interaction Summaries

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1. Enable the Interaction Summary setting.
  - a. From Setup, in the Quick Find box, enter *Interaction Summary*, and then select **Interaction Summary Settings**.
  - b. Enable **Interaction Summary**.
2. Add the Interaction Summaries component to the home or account page.
  - a. On the home page or the account record page, click the Setup icon, and select **Edit Page**.
  - b. Drag the Interaction Summaries component to the page.
  - c. Save your changes.
3. Add the Interaction Attendees component to the interaction summary or interaction page.
  - a. On the interaction summary or interaction record page, click the Setup icon, and select **Edit Page**.
  - b. Drag the Interaction Attendees component to the page or to a tab on the page.
  - c. Save your changes.

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## Configure Sharing Settings for Interaction Summaries

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1. To prevent users from gaining automatic access to interaction summaries owned by or shared with their subordinates in a role hierarchy, disable the Role-Hierarchy-Based Sharing for Interaction Summaries setting.
  - a. From Setup, in the Quick Find box, enter *Interaction Summary*, and then select **Interaction Summary Settings**.
  - b. Disable **Role-Hierarchy-Based Sharing for Interaction Summaries**.
    -  **Note:** This setting is available only if the Interaction Summary setting is enabled.
2. Enable compliant data sharing for the Interaction Summary object.
  - a. From Setup, in the Quick Find box, enter *Compliant Data Sharing*, and then select **Object Enablement Settings**.
  - b. Enable **Interaction Summary**.

SEE ALSO:

[Sharing Settings](#)

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

## Work with Interaction Summaries

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

[Create an Interaction](#)

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

[Add Attendees to an Interaction](#)

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

[Create an Interaction Summary](#)

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

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### [Share an Interaction Summary](#)

You can share an interaction summary with users or groups by adding them as participants to the interaction summary.

## Create an Interaction

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

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

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## Add Attendees to an Interaction

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

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

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



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

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

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SEE ALSO:

[Enable and Configure Interaction Summaries](#)

## Create an Interaction Summary

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

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

1. On an account record page, on the Interaction Summaries component, click **New**.

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2. Enter a title for the interaction summary and select the interaction that you're creating the summary for.
3. Specify the other details, such as interaction purpose, confidentiality, status, meeting notes, and next steps.
4. Select the related opportunity, partner account, and offering, if any.
5. Save your changes.

SEE ALSO:

[Enable and Configure Interaction Summaries](#)

## Share an Interaction Summary

You can share an interaction summary with users or groups by adding them as participants to the interaction summary.

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

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

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## Insurance for Financial Services Cloud

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

### [Set Policy Type Order](#)

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

### [Set a Custom Title for the Policy Component](#)

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

### EDITIONS

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

## Set Policy Type Order

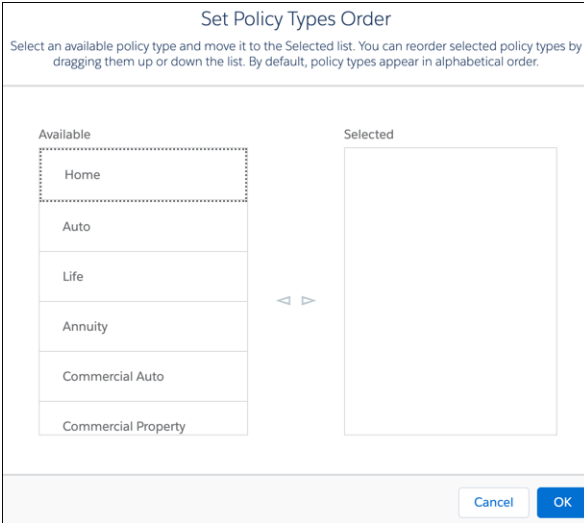
You can customize the policy type display order on the Policy component. For example, you can keep the most popular or frequently used policy types at the top of the list. By default, policy types appear in alphabetical order.

1. On an account or household page, from Setup, select **Edit Page**.
2. Click anywhere on the Policy component to select it.
3. In the properties pane, under Set Policy Types Order, click **Select**.

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4. Move policy types to the Selected list, reorder them by dragging them up or down the list, and click **OK**.



5. Save your changes.

## Set a Custom Title for the Policy Component

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

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

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

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

### [Enable the RBL Using Data Processing Engine Framework](#)

To enable the new RBL framework in your org, enable the RBL Using Data Processing Engine setting. After you enable the new RBL framework, you can't create, update, or deleting any RBL rules in the old framework.

### [Convert RBL Rules into Data Processing Engine Definitions](#)

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

### [Run, Schedule, and Monitor Data Processing Engine Definitions](#)

After the RBL rules are converted into Data Processing Engine definitions, you can view, edit, run, or schedule them in Data Processing Engine.

## Enable the RBL Using Data Processing Engine Framework

To enable the new RBL framework in your org, enable the RBL Using Data Processing Engine setting. After you enable the new RBL framework, you can't create, update, or deleting any RBL rules in the old framework.

1. From Setup, in the Quick Find box, enter *Financial Services*, and then select **General Settings**.

2. Enable **RBL Using Data Processing Engine**.

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

### EDITIONS

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## Convert RBL Rules into Data Processing Engine Definitions

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

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

1. From Setup, in the Quick Find box, enter *Financial Services*, and then select **General Settings**.

2. Enable **Convert RBL Rules into Data Processing Engine Definitions**.



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

3. Assign the System Administrator profile to your RBL users (users who'll be running the RBL rules).

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## Run, Schedule, and Monitor Data Processing Engine Definitions

After the RBL rules are converted into Data Processing Engine definitions, you can view, edit, run, or schedule them in Data Processing Engine.