Financial Services Cloud Admin Guide

Salesforce, Spring '24

'24

CONTENTS

FINANCIAL SERVICES CLOUD

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

We've done the hard part. Your users get the tools that let them focus on high-value customer activities instead of routine, administrative tasks. As an admin, you get the trusted power, security, and scalability of the Salesforce platform—tailored to streamline implementation for financial institutions. Start with a Financial Services Cloud trial org. Or install the Financial Services Cloud managed package and the unmanaged extension package. Connect data from your banking, portfolio management, financial planning, and other systems. And then configure the app to suit how your users like to work.

Learn About Financial Services Cloud and Explore

Learn how Financial Services Cloud can help your business and customers. Understand its core functionality, create a trial org, and learn how to get started.

Plan and Prepare for Your Financial Services Cloud Implementation

Review planning considerations before you plan your Financial Services Cloud implementation.

Subverticals in Financial Services Cloud

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

Common Capabilities in Financial Services Cloud

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

Add-Ons for Financial Services Cloud

Set up and manage products that you can add on to Financial Services Cloud.

Extend Financial Services Cloud with Other Salesforce Products

Use other Salesforce products with Financial Services Cloud.

Work with Data in Financial Services Cloud

Integrating data from custodians, banking systems, financial planning, portfolio management, asset aggregation, and all the other platforms that support your front- to back-office is a major implementation task. If you use Data Loader to bulk import data, we recommend a sequence for exporting and importing the initial objects.

Financial Services Cloud Availability and Limitations

Financial Services Cloud works differently from other Salesforce features. Learn about the issues to expect as you implement the app and as your users start to work in it.

Financial Services Cloud Printed Resources

In addition to online help, the Financial Services Cloud has guides to help you learn about and successfully administer your Financial Services Cloud features.

SEE ALSO:

Financial Services Cloud Developer Guide

Salesforce Release Notes

Financial Services Cloud User Guide

Learn About Financial Services Cloud and Explore

Learn how Financial Services Cloud can help your business and customers. Understand its core functionality, create a trial org, and learn how to get started.

Retail Banking

By using Financial Services Cloud for Retail Banking, bankers, loan officers, tellers, and operations associates get a 360-degree view of their customers including customer profile, interests, life goals, and events, as well as financial accounts. Explore a trial org and learn about what's included, what setup is recommended, and how to get ready for your implementation.

Wealth Management

Financial advisors can use the Wealth Management Lightning app for a complete view of their customers and to deliver the personalized, proactive service that their clients expect. Advisors can deepen client relationships, personalize engagements, and increase productivity to scale their reach and to grow their business. Explore a trial org to learn about what's included, what setup we recommend, and how to get ready for your implementation.

Insurance

The Insurance Agent Console app helps agents and service reps track their performance and stay focused on their goals. The distributor performance dashboard, reports, and performance metrics, provide sales managers with a consolidated performance summary for all their distributors. The Insurance Agent Portal template gives independent insurance agents access to insurance features and components and lets them manage and grow their books of business.

Onboarding

The Discovery Framework feature lets you create and manage assessment questions, surface digital assessments, and collect information for onboarding customers. You can use the Know Your Customer (KYC) data model to validate prospect information and assign a risk rating. By using the Data Consumption Framework, you can also easily set up integrations with third-party providers for assessing risk and for screening.

Mortgage

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

Commercial Banking

The Commercial Banking Console app give bankers greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more. The Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

SEE ALSO:

The Salesforce Data Model for Financial Services Cloud

Create a Financial Services Cloud Trial Org and Explore

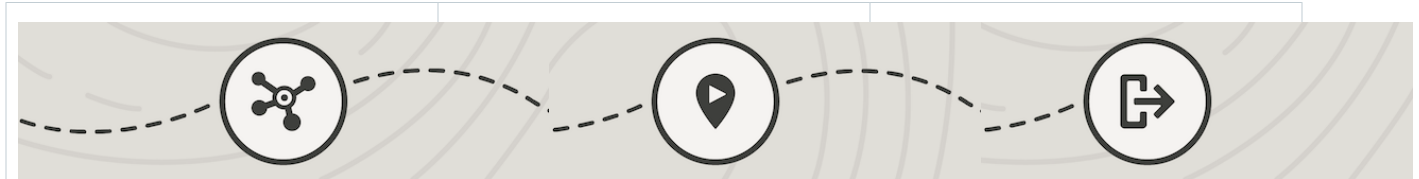# Get Started With Financial Services Cloud for Retail Banking

Financial Services Cloud for Retail Banking provides bankers, loan officers, tellers, and operations associates with a 360-degree view of their customers including customer profile, interests, life goals, and events, and financial accounts. Explore a trial org and learn about what's included, what setup we recommend, and how to get ready for your implementation.

Bankers can also onboard customers, track interactions, and get cross-departmental alerts for critical customer issues. Contact Center Agents can verify callers, view complete customer context, and conduct service transactions using a Unified Service Agent Console, eliminating the need to switch between multiple applications.

Use these resources to learn about the features and to plan your implementation.

Get Oriented

[What is Financial Services Cloud for Retail Banking?](#)

[Video: Watch a Demo](#)

[Create a Preconfigured Trial Org With Sample Data](#)

Dive In: Learn About Recommended Core Features

Customer Profiles

[Get a 360-Degree View of Your Customers](#)

[Visualize Groups and Relationships With a Relationship Map](#)

[Create and View Customer Relationships With Actionable Relationship Center](#)

[Streamline Your Customer Onboarding Experience](#)

[Aggregate Customer Information With Record Rollups](#)

Customer Interactions and Engagement

[Track Customer Interests](#)

[Record Meeting Notes With Interaction Summaries](#)

[Keep Track of Customer Life Events and Business Milestones](#)

Go Deeper: Learn About Features for Specific Business Needs

Customer Onboarding

[Collect and Validate Customer Data With Discovery Framework](#)

[Automate Repeatable Client-Engagement Tasks With Action Plans](#)

[Track Required Customer Documents](#)

Customer Service

[Verify Callers](#)

[Understand Customer History by Using Timeline](#)

[Surface Issues That Need Attention by Using Record Alerts](#)
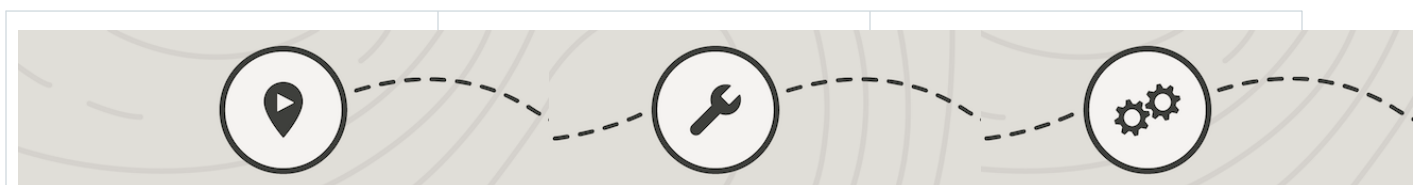
[Automate Banking Processes by Using Flow for Industries](#)

Extend Further: Learn About Additional Capabilities & Add-Ons	Get Ready for Your Implementation	Know Your Resources & Get Help
Manage Mortgage Applications	Understand How Customer Information Is Stored	Trailhead: Financial Services Cloud Trailmix
Track Branch Performance and Productivity	Set Up Permissions for Financial Services Cloud	Financial Services Cloud Developer Guide
Share Data in Compliance With Regulations and Policies	Set Up and Manage Retail Banking	Trailblazer Community: Financial Services Cloud
Track and Manage Financial Deals		
Send Customized Emails Using Marketing Cloud		

Get Started With Financial Services Cloud for Wealth Management

Financial advisors can use the Wealth Management Lightning app for a complete view of their customers and to deliver the personalized, proactive service that their clients expect. Advisors can deepen client relationships, personalize engagements, and increase productivity to scale their reach and to grow their business. Explore a trial org and learn about what's included, what setup we recommend, and how to get ready for your implementation.

Use these resources to learn about the features and to plan your implementation.

Get Oriented	Dive In: Learn About Recommended Core Features	Go Deeper: Learn About Features for Specific Business Needs
What is Financial Services Cloud for Wealth Management?	*Customer Profiles*	*Customer Onboarding*
Video: Watch a Demo	Get a 360-Degree View of Your Customers	Collect and Validate Customer Data with Discovery Framework
Create a Preconfigured Trial Org With Sample Data	Visualize Groups and Relationships With a Relationship Map	Automate Repeatable Client Engagement Tasks With Action Plans
	Create and View Complex Relationships With Actionable Relationship Center	Track Required Customer Documents

	Aggregate Customer Information With Record Rollups	Automate Wealth Business Processes and Streamline Workflows by Using Flow for Industries
	Create Advisor Task Lists and Action Plans	*Customer Service*
	Customer Interactions and Engagement	Verify Callers
	Take Advantage of Actionable Segmentation to Personalize Outreach and Engagement (Beta)	Understand Customer History by Using Timeline
	Track Customer Interests	Surface Issues That Need Attention by Using Record Alerts
	Record Meeting Notes With Interaction Summaries	
	Keep Track of Customer Life Events and Business Milestones	

Extend Further: Learn About Additional Capabilities & Add-Ons	**Get Ready for Your Implementation**	**Know Your Resources & Get Help**
Track and Manage Financial Deals	Understand How Customer Information Is Stored	Trailhead: Financial Services Cloud Trailmix
Track Branch Performance and Productivity	Set Up Permissions for Financial Services Cloud	Financial Services Cloud Developer Guide
Share Data in Compliance With Regulations and Policies	Set Up and Manage Wealth Management	Trailblazer Community: Financial Services Cloud
Send Customized Emails Using Marketing Cloud		

Get Started With Financial Services Cloud for Insurance

Insurance for Financial Services Cloud lets you effectively manage claims and policies, ensure customer satisfaction, and grow your business. Track product performance based on key metrics for policies, quotes, and commissions. Gain insights into claims performance and financial performance to effectively manage expenses and reserves, and write policies that help boost your revenue. Explore a trial org and then learn about what's included, what setup we recommend, and how to get ready for your implementation.

Use these resources to learn about the features and plan your implementation.
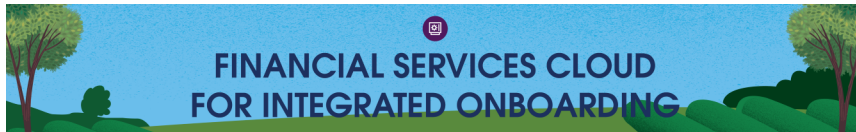
Get Oriented

What is Insurance for Financial Services Cloud?

Video: Watch a Demo

Create a Preconfigured Trial Org With Sample Data

Trailhead: Get to Know the Insurance Data Model

Dive In: Learn About Recommended Core Features

Customer Profiles

Get a 360-Degree View of Your Customers

Visualize Groups and Relationships With a Relationship Map

Create and View Customer Relationships With Actionable Relationship Center

Aggregate Customer Information With Record Rollups

Customer Interactions and Engagement

Track Customer Interests

Record Meeting Notes With Interaction Summaries

Keep Track of Customer Life Events and Business Milestones

Track Performance Metrics With the Insurance Agents Console

View Your Policyholders' Life Events, Policies, and Claims

Go Deeper: Learn About Features for Specific Business Needs

Customer Onboarding

Collect and Validate Customer Data With Discovery Framework

Automate Repeatable Client-Engagement Tasks With Action Plans

Track Required Customer Documents

Customer Service

Verify Callers

Understand Customer History by Using Timeline

Surface Issues That Need Attention by Using Record Alerts

Automate Banking Processes by Using Flow for Industries

Search for and Launch an Action Easily

Extend Further: Learn About Additional Capabilities & Add-Ons

Track Branch Performance and Productivity

Show Contextualized Information With FlexCard–Based Policy 360 Component

Send Customized Emails Using Marketing Cloud

Get Ready for Your Implementation

Trailhead: Insurance for Financial Services Cloud Admin Essentials

Understand How Customer Information Is Stored

Set Up Permissions for Financial Services Cloud

Set Up and Manage Insurance

Know Your Resources & Get Help

Trailhead: Financial Services Cloud Trailmix

Trailhead: Insurance for Financial Services Cloud Admin Advanced Features

Financial Services Cloud Developer Guide

Trailblazer Community: Financial Services Cloud

Get Started With Integrated Onboarding for Financial Services Cloud

The Discovery Framework feature lets you create and manage assessment questions, surface digital assessments, and collect information for onboarding customers. You can use the Know Your Customer (KYC) data model to validate prospect information and assign a risk rating. By using the Data Consumption Framework, you can also easily set up integrations with third-party providers for assessing risk and for screening.

Use these resources to learn about the features and plan your implementation—there's no need to set things up just yet. Plan to spend some time exploring the links on this page.

FINANCIAL SERVICES CLOUD FOR INTEGRATED ONBOARDING

Get Oriented

What is Financial Services Cloud for Retail Banking?

Trailhead: Discovery Framework Basics for Financial Services Cloud

Create a Preconfigured Trial Org With Sample Data

Dive In: Learn About Recommended Core Features

Collect and Validate Customer Data With Discovery Framework on page 237

Set Up the Know Your Customers Data Model on page 384

Streamline Your Customer Onboarding Experience

Access Data From External Systems for Identity Verification, Risk Assessment, and Screening Checks on page 232

Trailhead: Build Guided Experiences with OmniStudio

Validate Documents in Document Checklist Items

Trailhead: Build Flows with Flow Builder

Go Deeper: Learn About Features for Specific Business Needs

Dynamically Identify the Documents to Upload for an Assessment

Trailhead: Discover Disclosures and Consent Management

Trailhead: Deep Dive into OmniStudio Document Generation

Automate Repeatable Client-Engagement Tasks With Action Plans

Surface Issues That Need Attention by Using Record Alerts on page 387

Extend Further: Learn About Additional Capabilities & Add-Ons

Trailhead: Automate Complex Decision Making to Streamline Business Processes

Get Ready for Your Implementation

Set Up Permissions for Financial Services Cloud

Install or Upgrade the OmniStudio Package

Enable Discovery Framework

Know Your Resources & Get Help

Trailhead: Financial Services Cloud Trailmix

Financial Services Cloud Developer Guide

Trailblazer Community: Financial Services Cloud

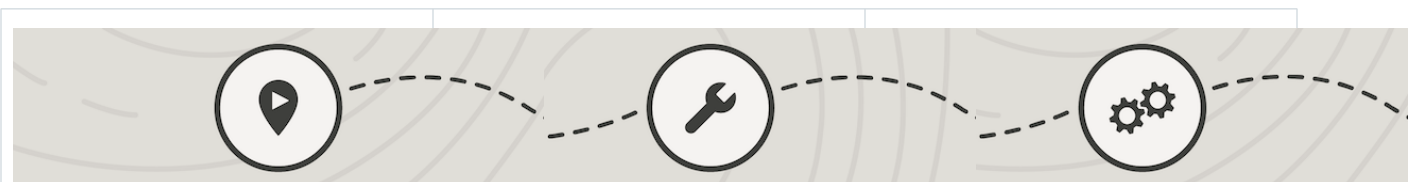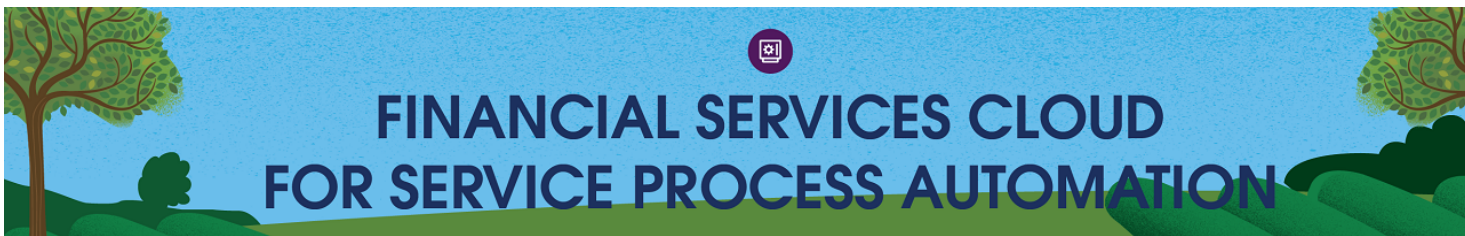|		
Track Customer Interests on page 371	Enable Know Your Customer on page 385	
Transform Data with Data Processing Engine		
Centralize All Your Document Management Tasks With Intelligent Document Automation		
Extract Data From Documents by Using Intelligent Form Reader		
Create Branded Digital Experiences with Experience Cloud		

Get Started With Service Process Automation for Financial Services Cloud

Service Process Automation lets you deploy prebuilt service processes for common service requests with ease. By using Service Process Studio, you can build a process quickly with low code or no code. With Data Consumption Framework, you can make API calls to external banking systems with high-performance integrations. Service Process Automation offers features beyond what Service Cloud already provides.

Use these resources to learn about the features and plan your implementation—there's no need to set things up just yet. Plan to spend some time exploring the links on this page.

FINANCIAL SERVICES CLOUD
FOR SERVICE PROCESS AUTOMATION

Get Oriented	**Dive In: Learn About Recommended Core Features**	**Go Deeper: Learn About Features for Specific Business Needs**
	Administrators and Developers	*Customer Onboarding and Service*
What is Financial Services Cloud for Retail Banking?	Design Customer Service Processes Easily With Service Process Studio	Collect and Validate Customer Data With Discovery Framework
What is Financial Services Cloud for Wealth Banking?	Trailhead: Build Guided Experiences with OmniStudio	Automate Repeatable Client-Engagement Tasks With Action Plans
Trailhead: Service Process Studio for Financial Services	Set Up Integrations to External Banking Systems with Integration Definitions	Verify Callers
Video: Watch a Demo	Trailhead: Automate Complex Decision Making to Streamline Business Processes	Understand Customer History by Using Timeline
Create a Preconfigured Trial Org With Sample Data	*Service Agents and Customers*	Get a 360-Degree View of Financial Accounts of Your Customers

| | Get to Know the Prebuilt Services Processes for Financial Services Cloud | Surface Issues That Need Attention by Using Record Alerts |
| | Initiate a Service Process From a Self Service Portal | Search for and Launch an Service Process Action Easily |

Extend Further: Learn About Additional Capabilities & Add-Ons	**Get Ready for Your Implementation**	**Know Your Resources & Get Help**
Deliver Engaging, Personalized Customer Support With Service Cloud	Install the Financial Services Cloud Packages	Trailhead: Financial Services Cloud Trailmix
Trailhead: Set Up Templates for Generating Business Documents with OmniStudio Document Generation	Install or Upgrade the OmniStudio Package	Financial Services Cloud Developer Guide
	Set Up Permissions for Financial Services Cloud	Trailblazer Community: Financial Services Cloud
	Set Up and Manage Retail Banking	
	Set Up and Manage Wealth Banking	

The Salesforce Data Model for Financial Services Cloud

Learn how we've adapted the Salesforce data model to create a foundation for industries that require a structured, flexible B2C data model. New custom fields on the Account and Contact standard objects let us model clients. New custom objects let us model client financials, relationship groups, and more.

Data Model Overview
Learn about the objects and relationships within the Financial Services Cloud data model that represent a person along with their relationships and financial activities.

How Is a Person Modeled?
Financial Services Cloud represents a person in one of two ways: person accounts or the individual model. Person accounts provide better support for B2C activities for most organizations and are enabled in FSC trial orgs and new installations. Salesforce supports the individual model for FSC orgs with existing individual model implementations only.

What Is a Group?
A group gives insight into a customer's financial circles, such as a household with its family members and professional connections. A group provides an overall view of its members by rolling up their information. You can extend a group with custom fields and more.

What Is a Relationship?
In addition to recording complex, multi-party relationships using groups, Financial Services Cloud also models one-to-one relationships between people and businesses. These relationships help you understand spheres of influence and spans of control.

How Are Employment and Education Modeled?
Custom objects represent employment and education information. In the individual model, these objects are related to the contact object.

Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the account object.

Custom objects are used to represent financial accounts and the parties involved with their financial accounts. In the individual model, these objects are related to the account object.

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

Review the objects that come with Financial Services Cloud using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.

Data Model Overview

Learn about the objects and relationships within the Financial Services Cloud data model that represent a person along with their relationships and financial activities.

> 📝 **Note:** In some cases, two Financial Services Cloud objects with the same label show in the Object Manager, one a standard object and the other a custom object. The custom object is only available if the Financial Services Cloud package is installed.
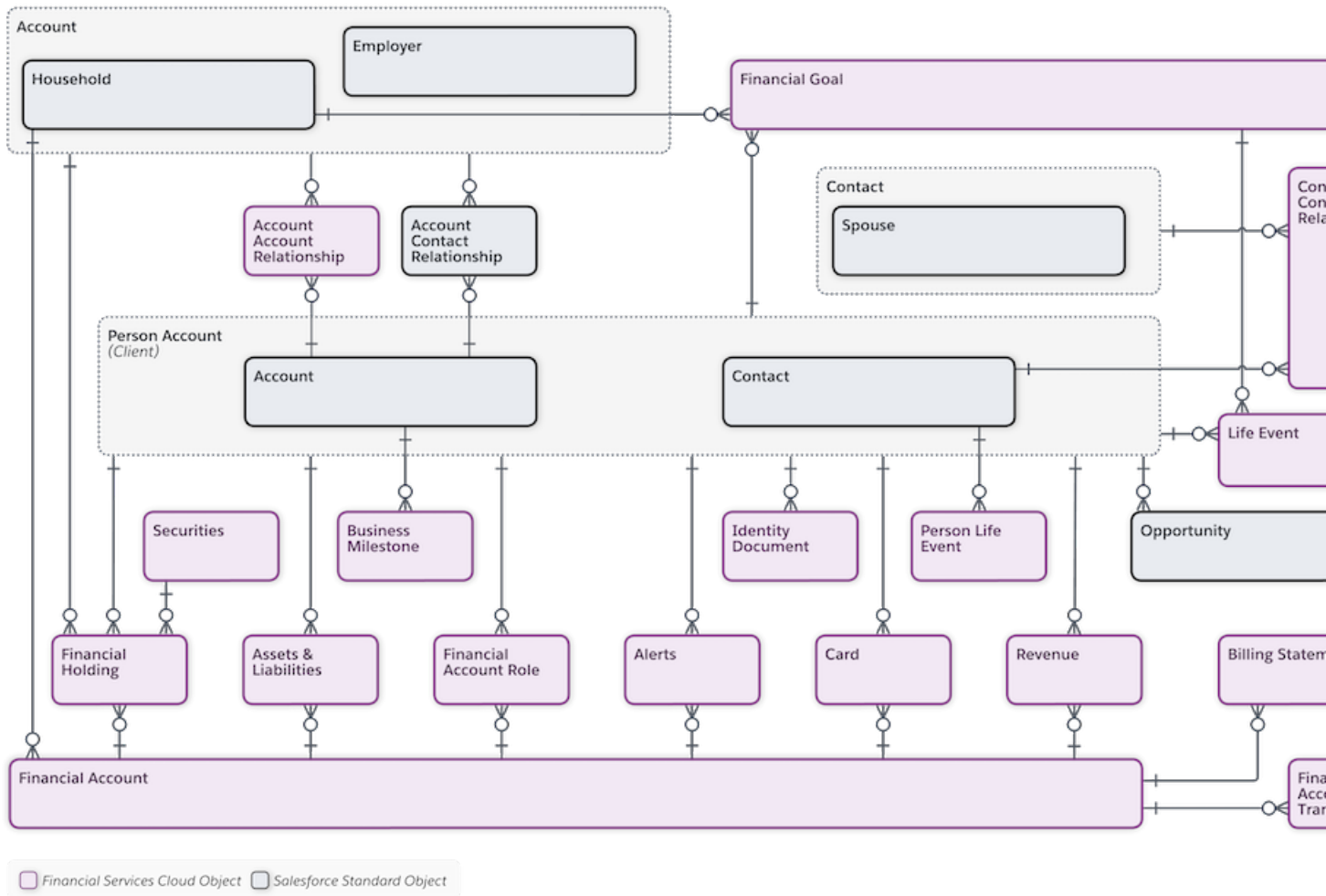
EDITIONS

Financial Services Cloud is available in Lightning Experience.

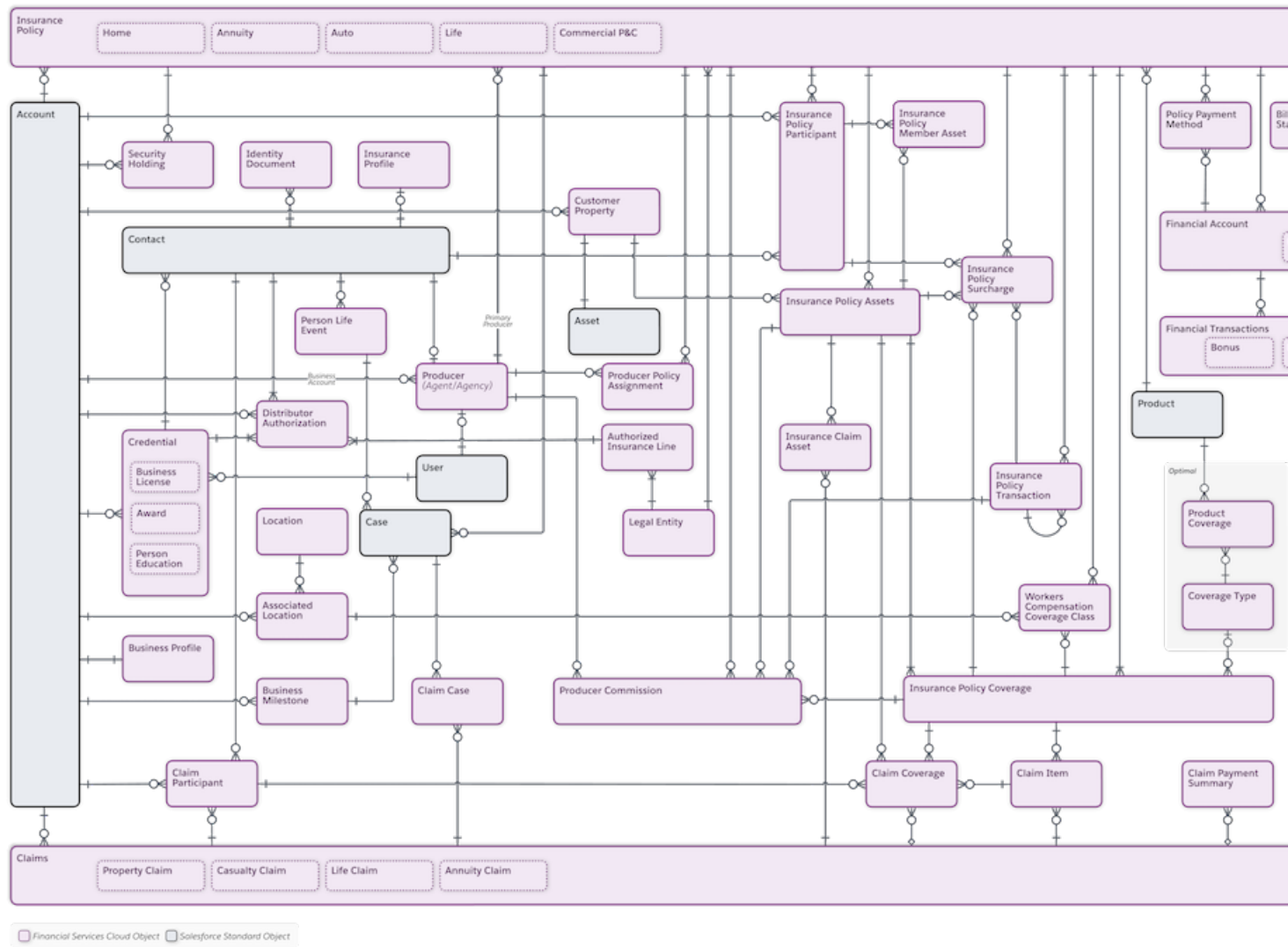Available in: **Professional**, **Enterprise**, and **Unlimited** editions

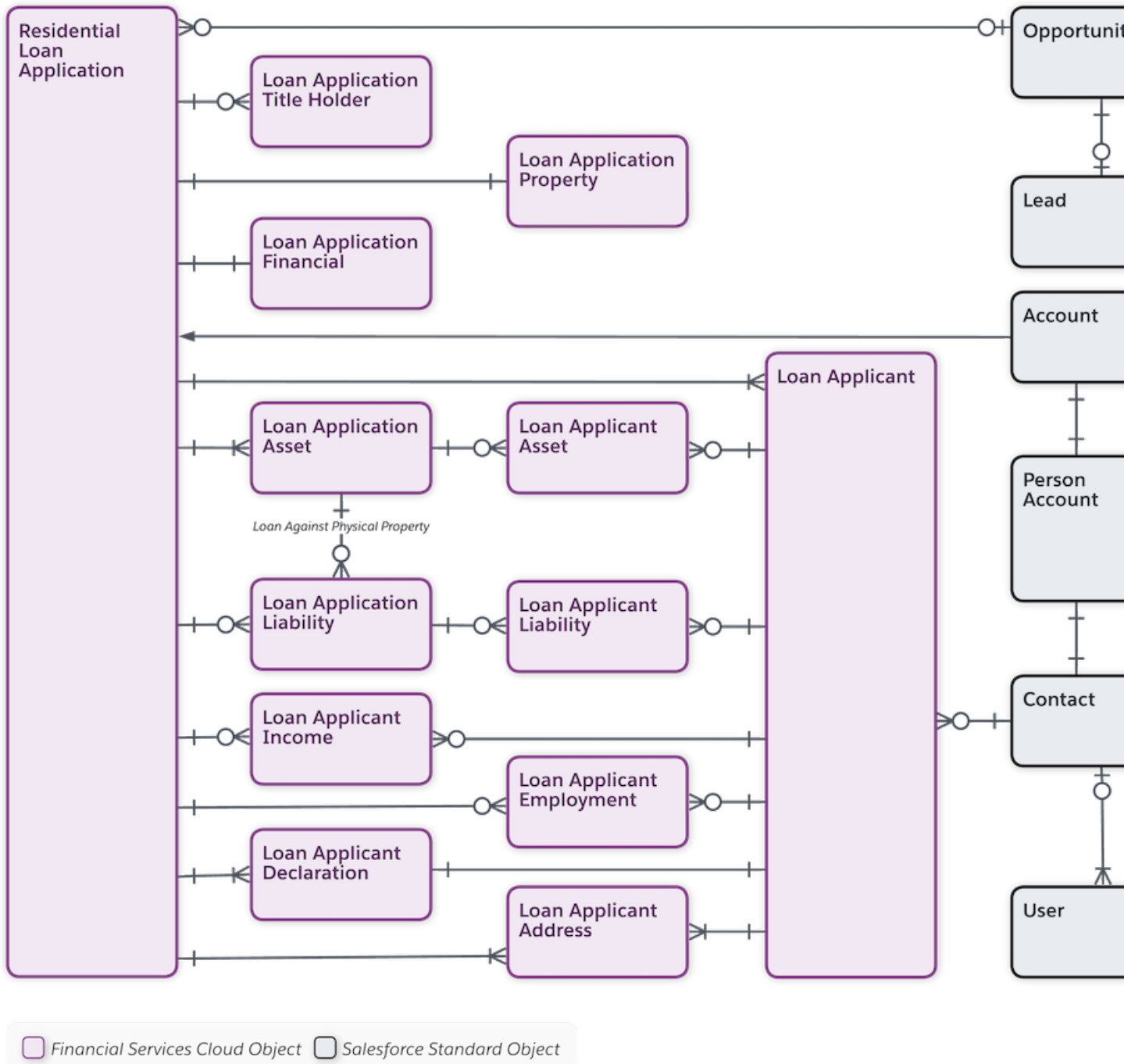## Financial Services Cloud Data Model Overview
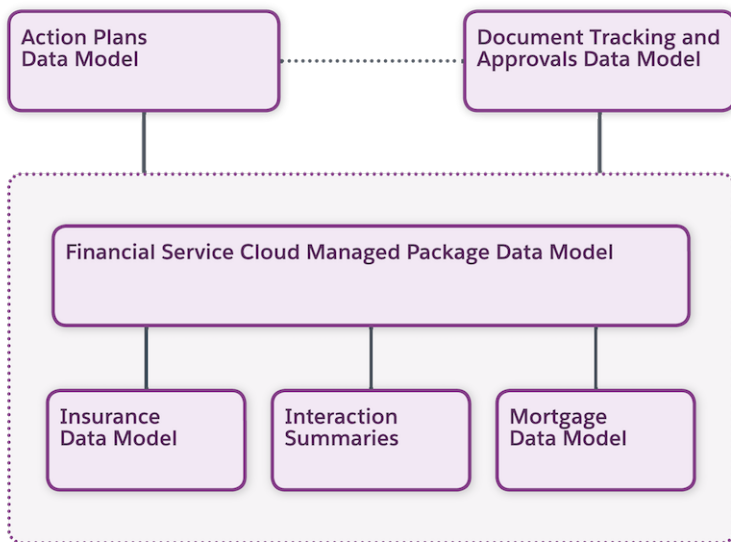
Financial Services Cloud Managed Package Data Model

Financial Services Cloud Insurance Data Model

Interaction Summaries Data Model

Financial Services Cloud Object Salesforce Standard Object

Financial Deal Management Data Model

Financial Services Cloud Object   Salesforce Standard Object

Financial Services Cloud Mortgage Data Model

Financial Services Cloud Object ☐ Salesforce Standard Object

Action Plans Data Model
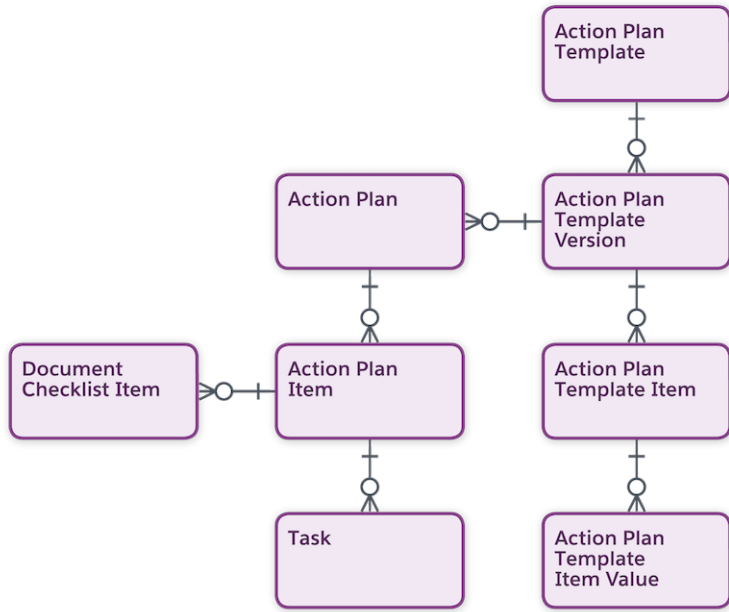
Consent Data Model

Discovery Framework Data Model
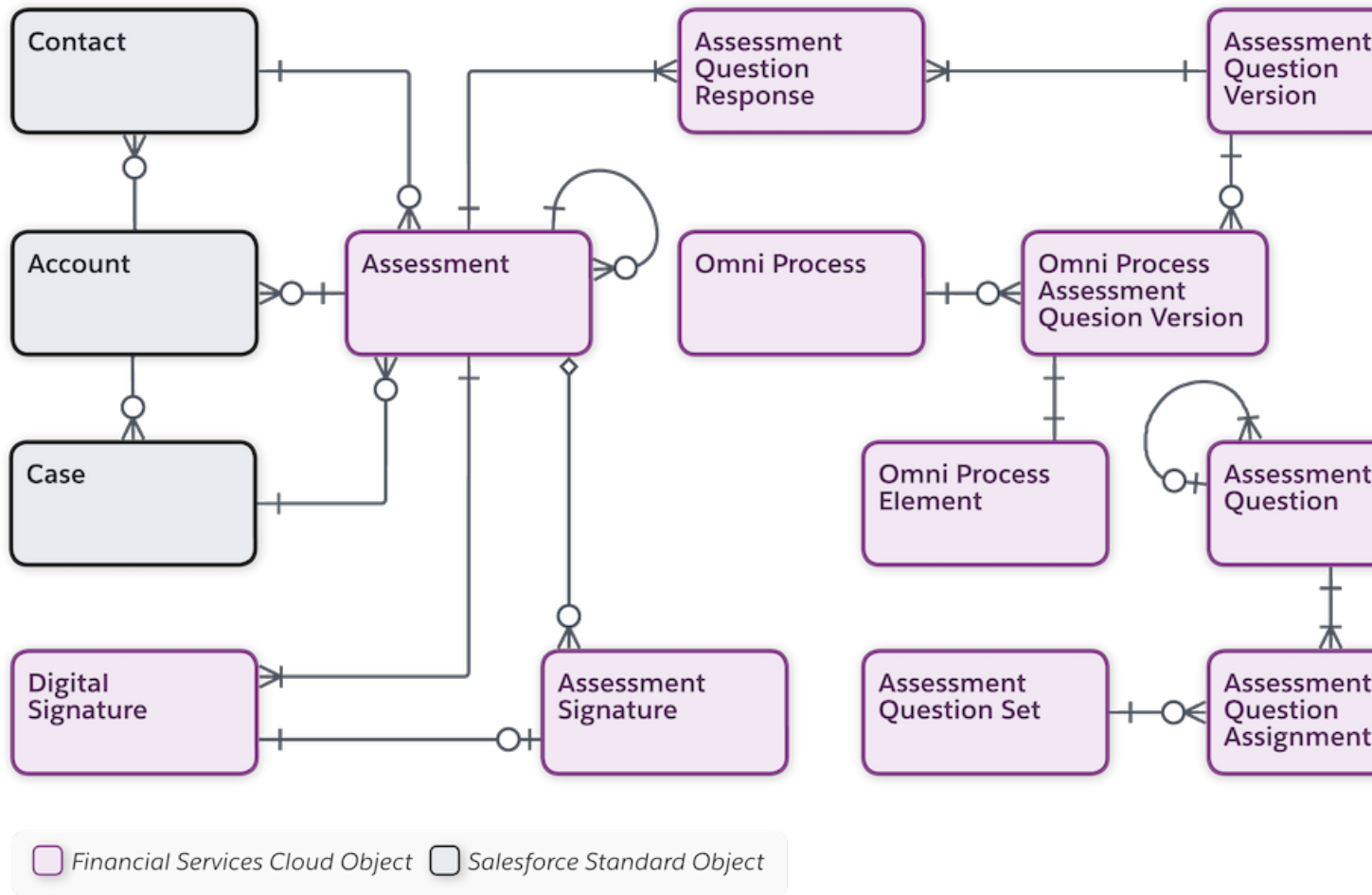
Know Your Customer Data Model

Branch Management Data Model

Financial Services Cloud Object   Salesforce Standard Object
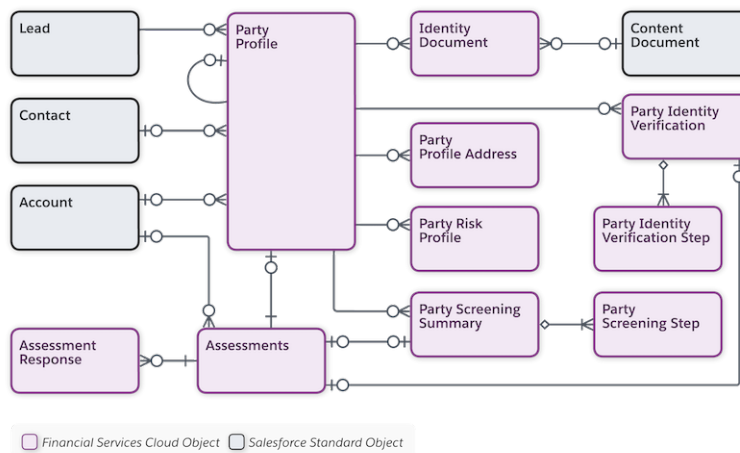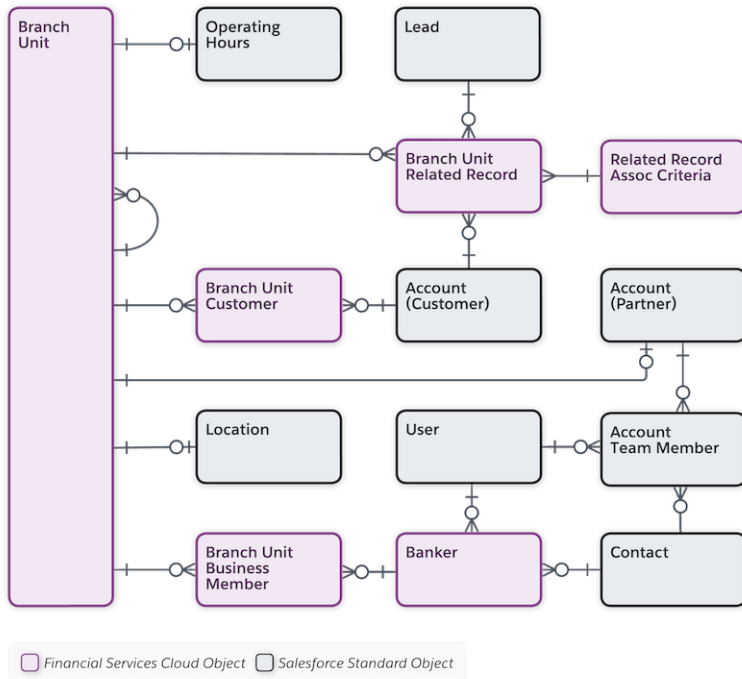
Integrated Onboarding Data Model
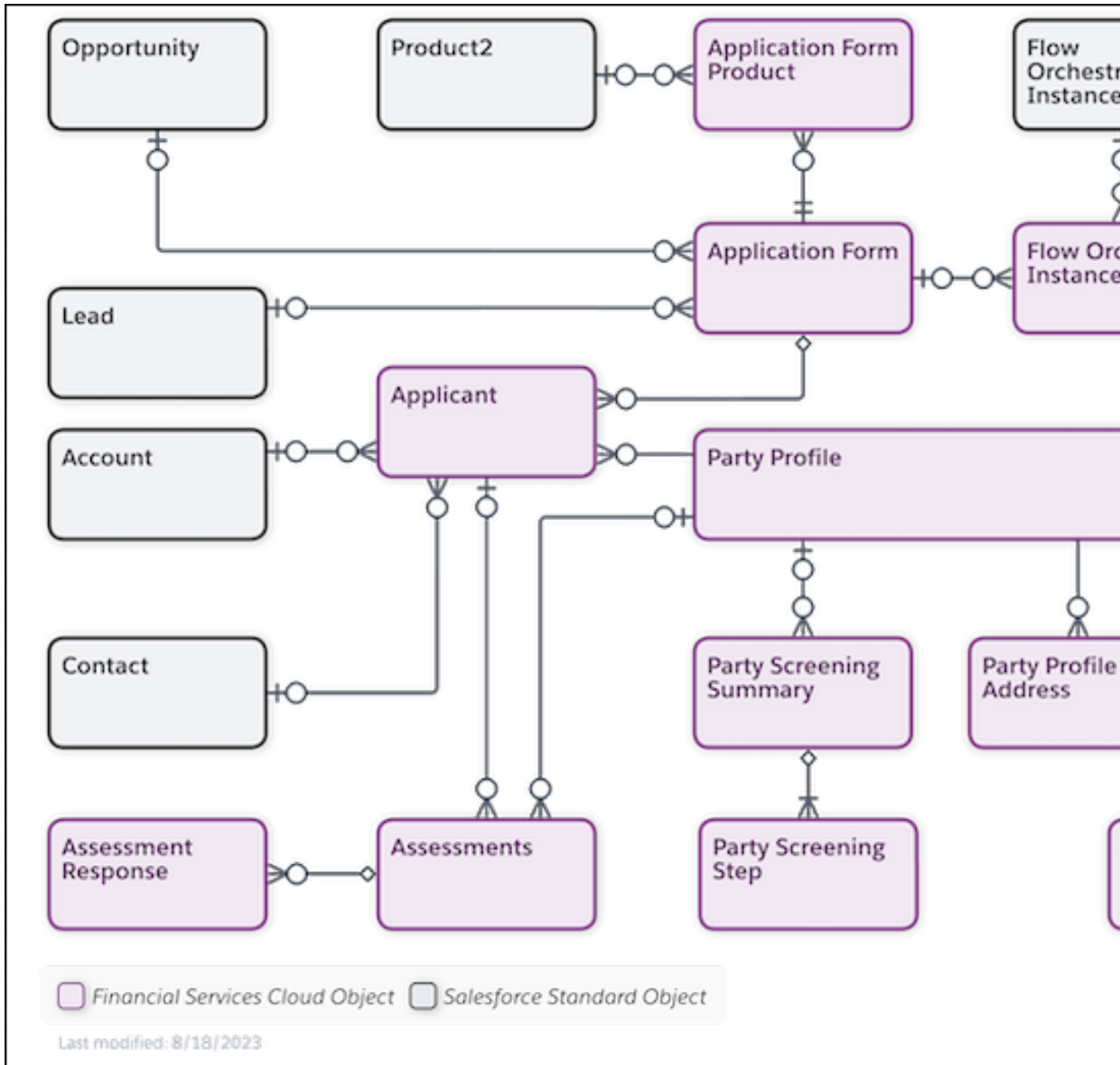
How Is a Person Modeled?

Financial Services Cloud represents a person in one of two ways: person accounts or the individual model. Person accounts provide better support for B2C activities for most organizations and are enabled in FSC trial orgs and new installations. Salesforce supports the individual model for FSC orgs with existing individual model implementations only.

Person Accounts

Person accounts store information about a person by combining certain account and contact fields into a single object experience. To end users, a person account record appears and functions as a single record.

The Individual Model

The individual model uses a combination of the standard Account and Contact objects, coupled in a *unified object view* of a person. The standard objects have been extended with custom fields, record types, and more.

Person Accounts

Person accounts store information about a person by combining certain account and contact fields into a single object experience. To end users, a person account record appears and functions as a single record.

Person accounts use the standard Account object to hold all of the details about a person. The Account object has been extended with custom fields, record types, and more.

Object	Standard or Custom	Purpose	Record Types
Account	Standard	• Represents all aspects of the person. Data includes personhood details, such as birth date or tax ID number, and dealings with your organization, such as review frequency or service tier • Related to opportunities, cases, and other Salesforce transactions as well as events, tasks, calls, and other Salesforce communications	Person account

> 📝 **Note:** Use the Person account record type when a client is a person. Use the Institutional record type when a client is a business or an institution.

SEE ALSO:

Person Accounts

Considerations for Using Person Accounts

Person Accounts Implementation Guide

The Individual Model

The individual model uses a combination of the standard Account and Contact objects, coupled in a *unified object view* of a person. The standard objects have been extended with custom fields, record types, and more.

> **Note:** Salesforce supports the individual model for FSC orgs with existing individual model implementations only. For legacy information about how to set up the individual model, see the Individual Model Setup in Financial Services Cloud section of the Spring '21 (API version 51.0) Financial Services Cloud Administrator Guide.

Object	Standard or Custom	Purpose	Record Types
Account	Standard	• Represents aspects of the person that pertain to dealings with your organization, such as review frequency or service tier • Related to opportunities, cases, and other Salesforce transactions	Individual
Contact	Standard	• Represents aspects of the person that pertain to personhood regardless of the person's relationship with your organization, such as birth date or tax ID number • Related to events, tasks, calls, and other Salesforce communications	Individual

> **Note:** Use the Individual record type when a client is a person. Use the Business record type when a client is a business or an institution.

When you create an individual record, Salesforce creates an account record and a contact record. The account item then records the contact item ID in the Primary Contact field to record the relationship between the two records. In addition, an Individual ID is added to Account and Contact, which enables you to reference the person with a single ID.

Usually, with the unified object view, individual records appear in Salesforce as a person, not as separate account and contact records. But not always. The structure under the hood sometimes surfaces in an account-only context or a contact-only context, such as in list views of accounts or contacts. In global search results, it can appear as though one individual record is a duplicate account and contact. Keep this structure in mind as you help your users get accustomed to working in Financial Services Cloud.

⨁ **Important:** Make sure that no required fields are on the Contact object. To add required fields in the individual model, create the fields on the Account object.

What Is a Group?

A group gives insight into a customer's financial circles, such as a household with its family members and professional connections. A group provides an overall view of its members by rolling up their information. You can extend a group with custom fields and more.

How Is a Group Modeled?

A group is a type of account record that people and businesses can be related to through the account contact relationship object. Financial Services Cloud includes a group record type for households. Use the household group to relate people to a household, household members to external contacts, and a household to external contacts and accounts.

You create groups by adding a record type to the account object and mapping it to the custom metadata type of Group Record Type.

What Is Group Membership?

The relationship between a group and a person or business is called group membership. Group membership defines the role of the member within the group. For example, Rachel Adams plays the role of a spouse in the Adams Household.

Group membership also defines whether:

- The member is the primary member of the group. The primary member is the person you contact first about things that affect the entire group.
- The group is the member's primary group. This status defines which group the member's information is rolled up in. Each person can only have one primary group, and the person's information isn't rolled up in any other group. You can also choose which information rolls up to the group. The options are any combination of:
    - Financial Accounts
    - Financial Goals
    - Events
    - Tasks
    - Assets and Liabilities
    - Referrals

How Is Group Membership Modeled?

Group membership is modeled using the Account Contact Relationship object. Groups can have client (direct) and business (indirect) members.

Membership Type	Object	Standard or Custom	Represents	Record Types
Direct (individual member)	Account Contact Relationship	Standard	The membership of a person in a group (for example, a household).	

Membership Type	Object	Standard or Custom	Represents	Record Types
Indirect (business member)	Account Contact Relationship	Standard	The membership of a business in a group, which occurs only when both these conditions are met: • The business is related to a person in the group • The business's Add to Group flag is set	

> **Note:** Account Contact Relationship is also used to hold details of one-to-one relationships between people and businesses.

SEE ALSO:

What Is a Relationship?

In addition to recording complex, multi-party relationships using groups, Financial Services Cloud also models one-to-one relationships between people and businesses. These relationships help you understand spheres of influence and spans of control.

How Is a Relationship Modeled?

You can model relationships in various ways.

Object	Standard or Custom	Represents	Record Types
Account-Account Relationship	Custom	The relationship between businesses, institutions, and groups.	
Account Contact Relationship	Standard	The relationship between a person and a business or other account.	
Contact-Contact Relationship	Custom	The relationship between two people.	
Reciprocal Role	Custom	The nature of the relationship between a person and another person, business, or other account. For example, Proprietor and Owned Business. Used on the Account-Account Relationship and	

Object	Standard or Custom	Represents	Record Types
		Contact-Contact Relationship objects.	

📝 **Note:** Account Contact Relationship is also used to hold details about the members of a group.

SEE ALSO:

Create and Configure Custom Record Types for Individuals

Configure Reciprocal Roles

How Are Employment and Education Modeled?

Custom objects represent employment and education information. In the individual model, these objects are related to the contact object.

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

How Are Identification Documents, Other Assets, Liabilities, Goals, and Revenue Modeled?

Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the account object.

Object	Standard or Custom	Represents	Record Types
Assets and Liabilities	Custom	Assets, such as real estate or collectibles, and liabilities, such as a mortgage, that are not otherwise represented in the financial account.	• Asset • Liability
Financial Goal	Custom	A person's financial goal, such as retirement or home purchase.	

Object	Standard or Custom	Represents	Record Types
Identification Document	Custom	Details of documents used to verify the identity of a person.	
Revenue	Custom	Revenue generated from operating a person's financial account or by offering advisory services.	

How Are Financial Accounts Modeled?

Custom objects are used to represent financial accounts and the parties involved with their financial accounts. In the individual model, these objects are related to the account object.

Object	Standard or Custom	Represents	Record Types
Financial Account	Custom	A financial account, such as a brokerage account or bank account.	• Auto Loan • Bank Account • Checking Account • Credit Card • General Account • HELOC • Investment Account • Loan Account • Mortgage • Savings Account
Charges and Fees	Custom	The charges and fees taken for servicing a Financial Account. Record types differentiate between "line of credit" (Credit) and "deposit" (Debit) accounts.	• Credit • Debit
Financial Account Role	Custom	The role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.	• Account Role • Contact Role

Object	Standard or Custom	Represents	Record Types
Financial Account Transaction	Custom	The transactions that have taken place on a Financial Account.	
Billing Statement	Custom	Periodic summary of purchases, deposits, interest, fees, and charges against a Financial Account. Record types differentiate statement content and layouts between "line of credit" (Credit) and "deposit" (Debit) accounts.	• Credit • Debit
Card	Custom	The cards to access funds in a Financial Account.	
Financial Holding	Custom	A holding in an investment account, such as 10,000 shares of Salesforce (CRM).	
Securities	Custom	An asset that is part of a financial holding, such as a stock.	

How Are Leads and Opportunities Modeled?

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

Using the Referral record type on the Lead object, users can create and automatically route referrals based on a customer's expressed interest.

📝 Note: Many other standard Salesforce objects are used to provide the features of Financial Services Cloud. You can explore the full Salesforce data model using schema builder or learn more from Salesforce Architects.

Object	Standard or Custom	Represents	Record Types
Lead	Standard	Details of leads provided by customers, employees, and associates.	• General • Referral • Retirement Planning
Opportunity	Standard	Details of the opportunities to sell customers new products or services.	• General • Opportunity (Wallet Share) • Retirement Planning

Tools for Getting Oriented to the Data Model

Review the objects that come with Financial Services Cloud using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.

From Setup, enter `Schema Builder` or `API` in Quick Find. Then select **Schema Builder** or **API**. To review objects with the Object Manager, select **Object Manager** from the top of the Setup page. You can also use a describe call from the API to see the complete list of fields for an object.

See the Metadata API Developer Guide Quick Start for information on obtaining the Enterprise WSDL files.

Create a Financial Services Cloud Trial Org and Explore

Explore Financial Services Cloud in a full-featured trial experience.

> 📝 **Note:** Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

To sign up for a trial org:

1. Go to one of the trial org sign-up pages.

   Learning Org
   This fully configured org includes rich sample data and lets you see all the Financial Services Cloud features in action. Use these orgs to see what a comprehensive enablement looks like.

   Pre-Release Org
   This org provides a sneak peek at upcoming release features. You can create these orgs only during sandbox preview windows. The page is available when the preview window is open.

   Base Org
   This unconfigured org is a blank slate with only the necessary licenses and permissions. Use these orgs for quick proof-of-concept projects or general testing.

2. Enter your contact details.

3. Read and agree to the service agreement.

4. Click Submit.

After your org is created, look for an email with login details. Your trial org includes pre-enabled Financial Services Cloud features. It also includes Experience Cloud, Digital Process Automation, and CRMA for Financial Services Cloud.

Plan and Prepare for Your Financial Services Cloud Implementation

Review planning considerations before you plan your Financial Services Cloud implementation.

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

Transform the Individual Data Model to Person Accounts in Financial Services Cloud

Person accounts are the Salesforce platform solution for B2C activities. If you currently use the individual model in your Financial Services Cloud org, you can migrate to person accounts for a simplified, customizable user experience. Financial Services Cloud enables person accounts in trial orgs and new installations.

Financial Services Cloud Permission Set Licenses

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

Financial Services Cloud Field Sets

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

Custom Settings

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

Prepare to Use Financial Services Cloud

To prepare to use Financial Services Cloud, complete the tasks in this section.

Considerations for Designing Your Financial Services Cloud Implementation

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

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

- Review the out-of-the-box capabilities and compare them to your current needs. How do you want to change default configurations? Evaluate modifications to fields, picklists, layouts, and other features that are required to support your business processes.

- Plan for integrations with transactional systems, external data sources, custodians, and any other platforms that your business relies on.

- Beyond the pre-configured settings, evaluate whether you need advanced customizations.

- Estimate the size of your user base and determine your licensing requirements.

- Determine if any limits or limitations affect your implementation.

SEE ALSO:

Financial Services Cloud Availability and Limitations

Salesforce Help: Protect Your Salesforce Organization

Salesforce Help: What Determines Field Access?

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Transform the Individual Data Model to Person Accounts in Financial Services Cloud

Person accounts are the Salesforce platform solution for B2C activities. If you currently use the individual model in your Financial Services Cloud org, you can migrate to person accounts for a simplified, customizable user experience. Financial Services Cloud enables person accounts in trial orgs and new installations.

> **Note:** You can't disable person accounts after they've been enabled for your org. Before migrating to person accounts in Financial Services Cloud, create a sandbox to preview how person accounts affect your technical architecture and customizations.
>
> Account.Phone and Account.Fax fields are preserved during the conversion. Contact.Phone and Contact.Fax fields don't carry over from the individual data model to person accounts after conversion.

If you currently use person accounts in your non-Financial Services Cloud org, you may have the option of upgrading to Financial Services Cloud without migrating to a new org. For more information, contact your account manager.

Enable and Configure Person Accounts in Financial Services Cloud

Complete these steps to enable and configure person accounts for your org.

Create and Configure Custom Record Types for Individuals and Groups

If your users have individuals or groups that don't fit the default record type, you can create and configure a custom record type.

Set Up Lead Conversion and Referral Management for Person Accounts

To support conversion to person accounts, remove the Company field from your Lead and Referral page layouts.

Convert Individual Model Account and Contact Records to Person Account Records in Financial Services Cloud

Complete these steps to transform the individual data model to person accounts in Financial Services Cloud.

Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud

Use the Disable Primary Contact ID setting to remove the use of the Primary Contact field in Financial Services Cloud orgs.

Considerations for Transforming the Individual Data Model to Person Accounts in Financial Services Cloud

Review these considerations to determine whether transforming the individual data model to person accounts in Financial Services Cloud is right for your company.

SEE ALSO:

Person Accounts

Considerations for Using Person Accounts

Person Accounts Implementation Guide

Enable and Configure Person Accounts in Financial Services Cloud

Complete these steps to enable and configure person accounts for your org.

1. Enable Person Accounts.

2. From **Setup**, in the Quick Find box, enter `Custom Settings`, then select **Custom Settings**.

3. In the list of custom settings, click **Manage** next to the **Use Person Account** custom settings.

4. Click **Edit** next to **Use Person Account**. If no record exists, create one and label it `Use Person Account`.

   > Note: The label must be `Use Person Account` (singular), not `Use Person Accounts` (plural).

5. Click **Enable** and then click **Save**.

6. After Person Accounts are enabled, remove all Individual record type assignments from all profiles and enable person account record types for relevant profiles.

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

SEE ALSO:

Person Accounts

Considerations for Using Person Accounts

Person Accounts Implementation Guide

Create and Configure Custom Record Types for Individuals and Groups

If your users have individuals or groups that don't fit the default record type, you can create and configure a custom record type.

Configure Custom Record Types for Groups

First, create custom account record types. Next, configure the record type mapping for the custom group record types. Then assign the record types to the user profiles that need them.

Create and Configure Custom Record Types for Individuals

First, create custom account record types. Next, configure the record type mapping for the custom account record types. Then assign the record types to the user profiles that need them.

SEE ALSO:

Salesforce Help: Create Record Types

Configure Custom Record Types for Groups

First, create custom account record types. Next, configure the record type mapping for the custom
group record types. Then assign the record types to the user profiles that need them.

1. Create a custom record type.

    a. From Setup, open **Object Manager**, and click **Account**.

    b. Open **Record Types**, and click **New**.

    c. For Existing Record Type, select **Household**, give your new record type a label, add a
        description, and set it as active.

    d. Enable the record type for the proper profiles, assign to one or more layouts, and then save
        your changes.

2. Configure the record type mapping for a custom group record type.

    a. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then select **Custom Metadata Types**.

    b. Click **Group Record Type Mapper**, and then click **Manage Group Record Type Mappers**.

    c. Click **New**.

    d. Enter the label of the record type that you created in step 1c.

    e. Don't change the automatically set Group Record Type Mapper Name.

    f. For Account Record Type, enter your custom account record type name.

    g. Enter the account namespace for your custom record type's org.

    h. Save your changes.

3. Verify that the new record type is assigned to the required profiles.

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

    b. Click the profile to which you want to assign the new record type.

    c. Click **Object Settings**.

    d. Click **Accounts**.

    e. Click **Edit**.

    f. In the Account: Record Types and Page Layout Assignments section, verify that the record type is assigned to the profile.

    g. Set the new record type as the default if necessary.

    h. Save your changes.

SEE ALSO:

Salesforce Security Guide: Assign Record Types and Page Layouts in the Enhanced Profile User Interface

What Is a Group?

Create and Configure Custom Record Types for Individuals

First, create custom account record types. Next, configure the record type mapping for the custom account record types. Then assign the record types to the user profiles that need them.

1. Create a custom individual record type.

   a. From Setup, open **Object Manager**, and click **Account**.

   b. Open **Record Types**, and click **New**.

   c. For Existing Record Type, select **Individual**, give your new record type a label, add a description, and set it as active.

   d. Enable the record type for the proper profiles, assign to one or more layouts, and then save your changes.

2. Configure the record type mapping for a custom record type.

   a. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then select **Custom Metadata Types**.

   b. Click **Individual Record Type Mapper** and then click **Manage Individual Record Type Mappers**.

   c. Click **New**.

   d. Enter `Person Account` as the label for the mapping record.

   > **Note:** If your org already has a mapper called Person Account, you don't have to create another one. You can name additional mapping records as you like. The Person Account mapper is used by Financial Services Cloud to create records.

   e. Don't change the automatically set **Individual Record Type Mapper Name**.

   f. For **Account Record Type**, enter the name of a valid person account record type to use in this mapping. You can use the default person account record type or one that you've created.

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

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

   h. Leave the **Contact Record Type** field blank. Person accounts don't use the contact record type.

   a. Leave the **Record Type Namespace (Contact)** field blank.

   b. Save your changes.

SEE ALSO:

Salesforce Security Guide: Assign Record Types and Page Layouts in the Enhanced Profile User Interface

What Is a Relationship?

Set Up Lead Conversion and Referral Management for Person Accounts

To support conversion to person accounts, remove the Company field from your Lead and Referral
page layouts.

1. From **Setup**, in the Quick Find box, enter `Custom Settings`, then select **Custom Settings**.

2. Click **Manage** next to **B2C Lead Company Name Config**.

3. Click **Edit** next to **System Administrator**. Deselect **Override Company Name** .

4. Save your changes.

5. Repeat these steps for all profiles configured in this custom setting.

Convert Individual Model Account and Contact Records to Person Account Records in Financial Services Cloud

Complete these steps to transform the individual data model to person accounts in Financial Services
Cloud.

> **Note:** You can't disable person accounts after they've been enabled for your org. Before
> completing these steps, create a sandbox to preview how person accounts affect your technical
> architecture and customizations.

Enable and configure person accounts in Financial Services Cloud before completing these steps.

1. Enable person accounts in your org.

2. Perform a data backup.

3. Enable person accounts in Financial Services Cloud with the Use Person Accounts custom setting.

4. Configure your Person Account record types in the Individual Record Type Mapper.

5. Validate and modify your data to meet these requirements before proceeding.

   a. Only individual accounts with single direct ACR can successfully convert to person accounts. For each person account, the
   account record can have only 1 contact record.

   b. The Account and Contact must have the same record owner.

   c. The Account and Contact must use the same currency value (if applicable).

   d. Both the Parent Account field on the account and the Reports To field of the contact must be blank.

   e. The account can't be the parent account of any other account records.

   f. No other contact records can report to the contact.

6. When converting, the contact name is mapped to person accounts. If you've used a middle name, salutation, and suffix, they are
   included in the name of your person account.

Export all individuals that you want to transform to person accounts.

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

1. Using Data Loader, export the IDs of all individual accounts. For example, you can use this query: `Select Id from Account`
   `where recordtype.name = '%Individual%'`

   > **Note:** If you have multiple record types that you want to retain, export accounts by record type and perform the following
   > steps for each record type. Export only the IDs of these accounts to a CSV file.

2. In the exported CSV file, add a column and title it `PersonRecordTypeId`. Add the Person Account Record Type ID in this
    column for all records.

    a. From Setup, open **Object Manager** and click **Person Account**.

    b. Open **Record Types** and click the **Person Account** record type.

    c. In your browser address bar, copy the ID and paste it into the CSV file. Repeat for all records.

3. Using Data Loader, update the account records.

    > 📝 **Note:** Use the update operation only. To prevent duplication, do not use the insert operation.

    a. Map Id to Id.

    b. Map PersonRecordTypeId to RecordTypeId.

    c. Update accounts using Data Loader. These individuals are now converted to person accounts.

After you have completed the transformation, validate that the records were converted.

1. Export all records to ensure that they have successfully converted to person accounts.

2. Open a converted record, and view all tabs (such as Relationships) to confirm that your data and relationships are unchanged.

SEE ALSO:

Person Accounts

Considerations for Using Person Accounts

Person Accounts Implementation Guide

Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud

Use the Disable Primary Contact ID setting to remove the use of the Primary Contact field in Financial
Services Cloud orgs.

Primary Contact is a custom field used in Financial Services Cloud's older individual model to connect
an account and a contact record. Financial Services Cloud's newer person account model uses the
Person Contact field. However, some UI components and all triggers related to the concept of a
client—such as account, contact, opportunity, and lead triggers—still reference Primary Contact.
Removing these dependencies can cause these results:

- Slower data conversion speed for large volumes of data due to the trigger logic execution.

- Slower data upload speed due to Primary Contact set in the trigger.

- Slower system updates because Primary Contact is updated in asynchronous mode. Apex waits
  for the asynchronous transaction to complete before it executes any Primary Contact-based
  custom logic.

- Slower creation of records with lookups to accounts in Financial Services Cloud because the
  lookup causes Primary Contact to refresh in an asynchronous job.

> ⛔ **Important:** If your business logic, page layouts, or trigger code refer to PrimaryContact__c,
> don't use the Disable Primary Contact ID setting.
>
> To avoid data inconsistencies in the PrimaryContact__c field, don't deselect Disable Primary
> Contact ID after you've selected it.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

EDITIONS

Financial Services Cloud is
available in Lightning
Experience.

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

USER PERMISSIONS

To manage, create, edit,
and delete custom settings:
- Customize Application

2. In the Custom Settings list, click **Manage** next to Industries Settings.

3. Click **Edit** next to Disable Primary Contact ID.

4. To stop updating Primary Contact ID, select **Disable**.

5. Save your changes.

Considerations for Transforming the Individual Data Model to Person Accounts in Financial Services Cloud

Review these considerations to determine whether transforming the individual data model to person accounts in Financial Services Cloud is right for your company.

After the person accounts model is enabled, you can't disable it. This restriction is valid across Salesforce and not limited to Financial Services Cloud.

Review your technical architecture and the customizations that you've made to the following to ensure compatibility with person accounts:

- Triggers, flows, and workflow rules

- Components

- Reports

Before switching from the individual data model to person accounts, be aware of the following:

- Sharing—If you enable person accounts, your options for Organization-Wide Defaults (OWD) sharing are limited to either Controlled by Parent on Contact or Private on Account and Contact.

- Business processes—If your org includes business accounts, contacts, and person accounts, consider whether you need to write separate business processes or workflows.

- Integration—Integrations between Salesforce and third-party systems via the API use the Account object to access person accounts. You can query and update the Contact object via the API, but person accounts are created with the Account object.

- AppExchange packages—Many applications designed for the Account and Contact objects work with person accounts. Check whether your third-party applications support person accounts.

After switching to person accounts:

- Use the Activities Lightning component, not the Client Activities component, to display the activity timeline for a person account.

- Use the standard Chatter Feed component, not the Client Collaborate component, for collaboration.

SEE ALSO:

Person Accounts

Considerations for Using Person Accounts

Person Accounts Implementation Guide

Financial Services Cloud Permission Set Licenses

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

Permission Set License	Description
Financial Services Cloud Basic	Enables user access to a permission set license with contractual restrictions for Financial Services Cloud. Use this permission set license to grant restricted access to users like tellers.
Financial Services 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 Services Cloud Extension	Enables user access to Lightning components and the extended version of Financial Services Cloud. Includes access to: • Actionable Relationship Center • Branch Management • Compliant Data Sharing • Discovery Framework • Document Automation • Financial Accounts • Financial Deal Management • Interaction Summaries • Interest Tags • Know Your Customer • Record Alerts • Slack for Financial Services Cloud • Tearsheets
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.
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.

Permission Set License	Description
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.
Financial Services Cloud Foundations	Enables user access to Financial Services Cloud Foundations features. Includes access to Financial Accounts, Discovery Framework, Interest Tags, Know Your Customer, and Record alerts.
OmniStudio	Enables user access to create new OmniScripts, DataRaptors, FlexCards, and Integration Procedures.
OmniStudio User	Enables users to execute OmniScripts, DataRaptors, FlexCards, and Integration Procedures.
Industry Service Excellence	Enables user access to Service Processes built using Service Process Studio, Caller Verification feature, Engagements, and Record Alerts feature. Use this permission set license to grant Create and Read access to Engagement Attendee, Engagement Interaction, and Engagement Topic objects.
Industry Sales Excellence	Enables user access to Actionable Segmentation, Record Alerts, and Caller Verification features.
Actionable Segmentation Engagement	Enables user access to objects and features to engage with list members.

Experience Cloud Permission Sets

Permission Set License	Description
Customer Community for Financial Services	Allows the customer community user to access Financial Services Cloud features.
Customer Community for Financial Services - Login	Allows the login-based customer community user to access Financial Services Cloud features.
Customer Community Plus for Financial Services	Allows the customer community plus user to access Financial Services Cloud features.
Customer Community Plus for Financial Services - Login	Allows the login-based customer community plus user to access Financial Services Cloud features.
External Apps for Financial Services	Allows the external apps user to access Financial Services Cloud features.
External Apps for Financial Services - Login	Allows the login based external apps user to access Financial Services Cloud features.

Note: When assigning a Financial Services Cloud Experience Cloud License to a user, select the license that matches the user's Experience Cloud License. For example, if a user has a Customer Community Plus permission set, assign the user Customer Community Plus for Financial Services permission set.

View and Assign Permission Set Licenses in Financial Services Cloud

Understand permission set licenses in Financial Services Cloud and how to assign them to users.

SEE ALSO:

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

Salesforce Help: Permission Set Licenses

View and Assign Permission Set Licenses in Financial Services Cloud

Understand permission set licenses in Financial Services Cloud and how to assign them to users.

Permission set licenses extend the functionality of a Salesforce user license and provide access to features and tools. Some permission set licenses are associated with a permission set, and when you assign the permission set to a user, you automatically assign the permission set license. Other permission set licenses are assigned directly to a user. Users need both the appropriate permission sets and permission set licenses to work in Financial Services Cloud.

The Salesforce platform, which underlies Financial Services Cloud, provides many base permission set licenses. Financial Services Cloud provides additional permission set licenses. The licenses that are available in your org depend on the product solution and add-ons that you purchase.

If you have questions about the permission set licenses in your org, contact your Salesforce account executive.

To see and assign permission set licenses:

1. From Setup, in the Quick Find box, search for and then select **Company Information**.
2. Select the **Permission Set Licenses** related list and, if desired, click **Go to list** to see the complete list.
3. Click any license name to see its details and assign it to users.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions where Financial Services Cloud license is enabled.

USER PERMISSIONS

To view permission sets:
- View Setup and Configuration

To assign permission sets:
- Assign Permission Sets

Financial Services Cloud Field Sets

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

Referrals and Scoring

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Relationship Groups

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

Field Set	API Name	Object	Where is it used?
LBLLabel_Field_Set_Relationship_Group_Members	WM_Client_Relationship_Group_Members	Account	Client profile's Relationship Groups table

Retail Banking

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

Wealth Management

Field Set	API Name	Object	Where is it used?
LBL.Label_Field_Set_Addresses	WM_Client_Profile_Details_Section_3	Account	Client profile's Details tab
LBL.Label_Field_Set_Addresses	WM_HH_Profile_Details_Section_2	Account	Household profile's Details tab
LBL.Label_Field_Set_Client_Header	WM_Client_Profile_Header	Account	Client profile's page header
LBL.Label_Field_Set_Client_Info	WM_Client_Edit_Section_1	Account	Edit client dialog box
LBL.Label_Field_Set_Client_Info	WM_Client_New_Section_1	Account	New client dialog box
LBL.Label_Field_Set_Client_Info	WM_Client_Profile_Details_Section_1	Account	Client profile's Details tab
LBL.Label_Field_Set_Client_Services	WM_Client_Edit_Section_4	Account	Edit client dialog box
LBL.Label_Field_Set_Client_Services	WM_Client_New_Section_3	Account	New client dialog box
LBL.Label_Field_Set_Client_Services	WM_Client_Profile_Details_Section_4	Account	Client profile's Details tab
LBL.Label_Field_Set_Employment_Info	WM_Client_Edit_Section_6	Account	Edit client dialog box
LBL.Label_Field_Set_Employment_Info	WM_Client_New_Section_5	Account	New client dialog box
LBL.Label_Field_Set_Employment_Info	WM_Client_Profile_Details_Section_6	Account	Client profile's Details tab
LBL.Label_Field_Set_Financial_Accounts_Summary	WM_Client_Profile_Fin_Acct_Summary	Account	Client profile's Financials tab
LBL.Label_Field_Set_Financial_Accounts_Summary	WM_HH_Profile_Fin_Acct_Summary	Account	Household profile's Financials tab
LBL.Label_Field_Set_Financial_Summary	WM_Client_Profile_Details_Section_7	Account	Client profile's Details tab
LBL.Label_Field_Set_Household_Header	WM_HH_Profile_Header	Account	Household profile's page header
LBL.Label_Field_Set_Household_Info	WM_HH_Profile_Details_Section_1	Account	Household profile's Details tab
LBL.Label_Field_Set_Household_Summary	WM_Client_Profile_Relations_HH_Summary	Account	Client and household profiles' Relationships tabs
LBL.Label_Field_Set_Know_Your_Client	WM_Client_Edit_Section_5	Account	Edit client dialog box
LBL.Label_Field_Set_Know_Your_Client	WM_Client_New_Section_4	Account	New client dialog box
LBL.Label_Field_Set_Know_Your_Client	WM_Client_Profile_Details_Section_5	Account	Client profile's Details tab
LBL.Label_Field_Set_Mailing_Address	WM_Client_Edit_Section_3	Account	Edit client dialog box
LBL.Label_Field_Set_Mailing_Address	WM_Client_New_Section_7	Account	New client dialog box
LBL.Label_Field_Set_Other_Address	WM_Client_Edit_Section_33	Account	Edit client dialog box
LBL.Label_Field_Set_Other_Address	WM_Client_New_Section_73	Account	New client dialog box
LBL.Label_Field_Set_Permanent_Address	WM_Client_Edit_Section_31	Account	Edit client dialog box
LBL.Label_Field_Set_Permanent_Address	WM_Client_New_Section_71	Account	New client dialog box
LBL.Label_Field_Set_Phone_and_Email	WM_Client_Edit_Section_2	Account	Edit client dialog box

Field Set	API Name	Object	Where is it used?
LBL.Label_Field_Set_Phone_and_Email	WM_Client_New_Section_6	Account	New client dialog box
LBL.Label_Field_Set_Phone_and_Email	WM_Client_Profile_Details_Section_2	Account	Client profile's Details tab
LBL.Label_Field_Set_Seasonal_Address	WM_Client_Edit_Section_32	Account	Edit client dialog box
LBL.Label_Field_Set_Seasonal_Address	WM_Client_New_Section_72	Account	New client dialog box
LBL.Label_Field_Set_System_Info	WM_Client_Profile_Details_Section_8	Account	Client profile's Details tab

Custom Settings

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

> **Note:** Hierarchical settings can be applied to the org, objects, and users with settings applying to the entities lower down the hierarchy. For example, assessing applied to org automatically applies to objects and users.

Table 4: Financial Services Cloud Custom Settings

Settings group	Setting	Effect	Hierarchical
B2C Lead Company Name Config	Override Company Name	Indicates whether the company name is replaced with a lead name when saving a lead with a record type of B2C. See Configure Company Name Override for Leads	Yes
Individual Excluded Fields	Excluded Fields	List of fields that are not returned for an Individual.	No
Industries Application Config	Account Name format	Indicates whether account name is displayed as [last name] [first name] or [first name] [last name]. See Reorder an Individual's First and Last Names.	Yes
Industries Application Config	Application Name	For internal use only.	Yes
Industries Application Config	Create Inverse	Indicates whether reciprocal AAR record is created.	Yes

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

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

Prepare to Use Financial Services Cloud

To prepare to use Financial Services Cloud, complete the tasks in this section.

📝 **Note:** When creating custom fields or objects, don't use the same API names as any packaged objects or fields. If you use the same names, the custom fields or objects can interfere with flows, processes, and triggers in Financial Services Cloud.

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.

Create Users

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

Create User Profiles for Other User Personas

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

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.

1. Log in to Salesforce as a Salesforce admin.

2. Verify that you can see Welcome to the Financial Service Cloud Learning Org.

Welcome to the Financial Services Cloud Learning Org

Here's a collection of resources to help you get started. Explore among the latest features below, available in Financial Services Cloud

➤ Retail Banking Learning Experience
Get a 360-degree view of customers with Retail Banking, a Financial Services Cloud Lightning app. Bankers can also easily manage high-volume transactions on one screen with the Retail Banking Console. The information bankers need is supported with new objects, fields, and record types for loans, deposits, and more.

➤ Wealth Management Learning Experience
Give your financial advisors a holistic view of customers with Wealth Management, a Financial Services Cloud Lightning app. Empower your advisors to deliver the personalized, proactive service that clients expect. Accelerate user productivity with technology that helps them engage with clients like never before, and build deeper, lasting, more profitable relationships.

Great, you are ready to get started.

If you don't find the welcome page, see 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.

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 Admin, Advisor, Personal Banker, or 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.

8. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign 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 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 App 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 App app.

SEE ALSO:

Create User Profiles for Other User Personas

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.

Subverticals in Financial Services Cloud

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

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

Set Up and Manage Commercial Banking

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

Set Up and Manage Insurance

Insurance for Financial Services Cloud includes a new data model for insurance, new Lightning components, and a tailored Lightning console app: Insurance Agent Console. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals. With the new distributor performance dashboard, reports, and performance metrics, sales managers can view a consolidated performance summary for all their distributors or monitor their individual performances. Use the Insurance Agent Portal template to create a portal that gives independent insurance agents access to the insurance features and components and lets them manage and grow their books of business.

Set Up and Manage Mortgage

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

Set Up and Manage Retail Banking

Get a 360-degree view of customers with Retail Banking, a Financial Services Cloud Lightning app. Bankers can also easily manage high-volume transactions on one screen with the Retail Banking Console. The information bankers need is supported with new objects, fields, and record types for loans, deposits, and more.

Set Up and Manage Wealth Management

Give your financial advisors a holistic view of customers with Wealth Management, a Financial Services Cloud Lightning app. Empower your advisors to deliver the personalized, proactive service that clients expect. Accelerate user productivity with technology that helps them engage with clients like never before, and build deeper, lasting, more profitable relationships.

Set Up and Manage Commercial Banking

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

Follow these steps to enable Commercial Banking features.

Enable Relationship Manager and Lending Assistant Permissions

Use permission sets to give your users access to the Commercial Banking Console Lightning app.

Assign Page Layouts to New Treasury Service Record Type

The Financial Account object includes the new Treasury Service record type to support commercial banking needs. This record type has a customized page layout that provides an optimal display of the record type information. This customized page layout is available to the Relationship Manager by default and can be added to other profiles as needed.

Assign the Commercial Banking Home Page to a Relationship Manager

Financial Services Cloud includes the Commercial Banking Home Page, which shows relationship managers the details they need.

Enable the Related Business Referrals List

Help relationship managers and lending assistant better manage their referrals by giving them the ability to identify related referrals.

Install the Commercial Banking Unmanaged Extension Package

Streamline the working day for relationship managers and lending assistants by providing them with the My Loans and Mortgages report and the Relationship Management Dashboard.

Add Commercial Banker Users

Add Commercial Banker users and assign them the Relationship Manager profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

Use New Custom Record Types for Referrals

A new custom metadata type enables you to work with new referral record types, similar to the business referrals delivered with Commercial Banking.

Enable Relationship Manager and Lending Assistant Permissions

Use permission sets to give your users access to the Commercial Banking Console Lightning app.

1. From Setup, enter *Users* in Quick Find, then select **Users**.

2. Click a user's name.

3. Under Permission Set Assignments, click **Edit Assignments**.

4. Add the Relationship Manager or Lending Assistant permission set as appropriate to the user.

5. Save your changes.

To update user details in bulk, see Tip Sheet: Manage Bulk Permission Set License (PSL) Assignments for Financial Services Cloud

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Assign Page Layouts to New Treasury Service Record Type

The Financial Account object includes the new Treasury Service record type to support commercial banking needs. This record type has a customized page layout that provides an optimal display of the record type information. This customized page layout is available to the Relationship Manager by default and can be added to other profiles as needed.

Follow these steps to assign the custom page to other profiles.

1. From Setup, open **Object Manager**.

2. Open Financial Account and then click **Record Types** (1).

3. Click **Page Layout Assignment** (2) and then **Edit Assignment**.
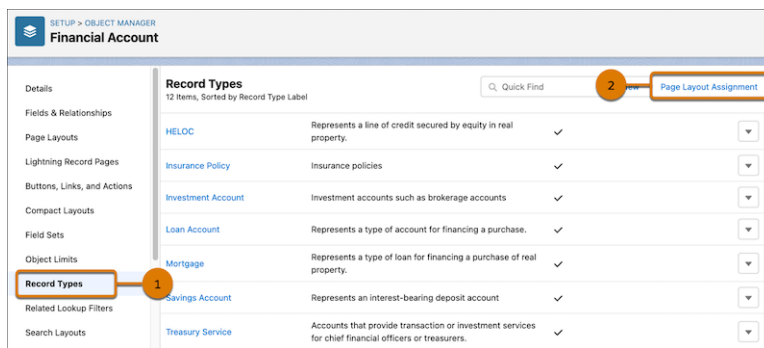
4. For the Treasury Service record type, select the cell for the profile to which the page layout is to be added.

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

6. Save your changes.

Assign the Commercial Banking Home Page to a Relationship Manager

Financial Services Cloud includes the Commercial Banking Home Page, which shows relationship managers the details they need.

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

1. From Setup, enter `Lightning App Builder` in Quick Find, then select **Lightning App Builder**.

2. Click **View** for **Commercial Banking Home Page**.

3. Click **Activation**.

4. Select **Assign this Home page to specific profiles** and click **Next**.

5. Select **Relationship Manager** from the list of profiles and click **Next**.

6. Activate your changes.

EDITIONS

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EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable the Related Business Referrals List

Help relationship managers and lending assistant better manage their referrals by giving them the ability to identify related referrals.

1. From Setup, open **Object Manager** and click **Account**.

2. Open **Page Layouts** and click **Account (Business Referral) Layout**.

3. In the sections list, click **Related Lists**.

4. Drag **Related Leads** to the Related Lists section.

5. Save your changes.

Install the Commercial Banking Unmanaged Extension Package

Streamline the working day for relationship managers and lending assistants by providing them with the My Loans and Mortgages report and the Relationship Management Dashboard.

1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Commercial Banking Ext unmanaged package.

2. Paste the URL into your browser navigation bar and press Enter.

3. If you received a password from Salesforce, enter it.

4. Select **Install for Specific Profiles**.

5. Scroll to the Select Specific Profiles section, and map the Relationship Manager and Lending Assistant profiles to the package profiles and set the access level to **Full Access**.

6. Click **Install**.

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

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

Add Commercial Banker Users

Add Commercial Banker users and assign them the Relationship Manager profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

1. From Setup, enter `Users` in Quick Find, then select **Users**.

2. Click **New User**. Enter the user's details and assign them the Salesforce user license and then the **Relationship Manager** profile.

3. Save your changes.

4. Under Permission Set Assignments, click **Edit Assignments**.

5. Under Available Permission Sets, add the Financial Services Cloud Standard and Relationship Manager Access permission sets to Enabled Permission Sets.

6. Save your changes.

   You can use subsets of the Commercial Banking features for other users, such as lending assistance. See the Financial Services Cloud Administrator Guide for details on how to set up these users.

Use New Custom Record Types for Referrals

A new custom metadata type enables you to work with new referral record types, similar to the business referrals delivered with Commercial Banking.

Create and Configure Custom Record Types for Referrals

First create a custom record type on leads, based on the referral record type. Configure the record type mapping for the custom referral record type, then assign the record type to the user profiles that need them.

Add the Referral Component to Lightning Pages

You can add the referral component to Lightning pages to enable users to create specific referral record types. You can add multiple versions of the component to enable various referral record types to be created from a page.

Show the Referrer Score Field to Experience Cloud Users

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

Create and Configure Custom Record Types for Referrals

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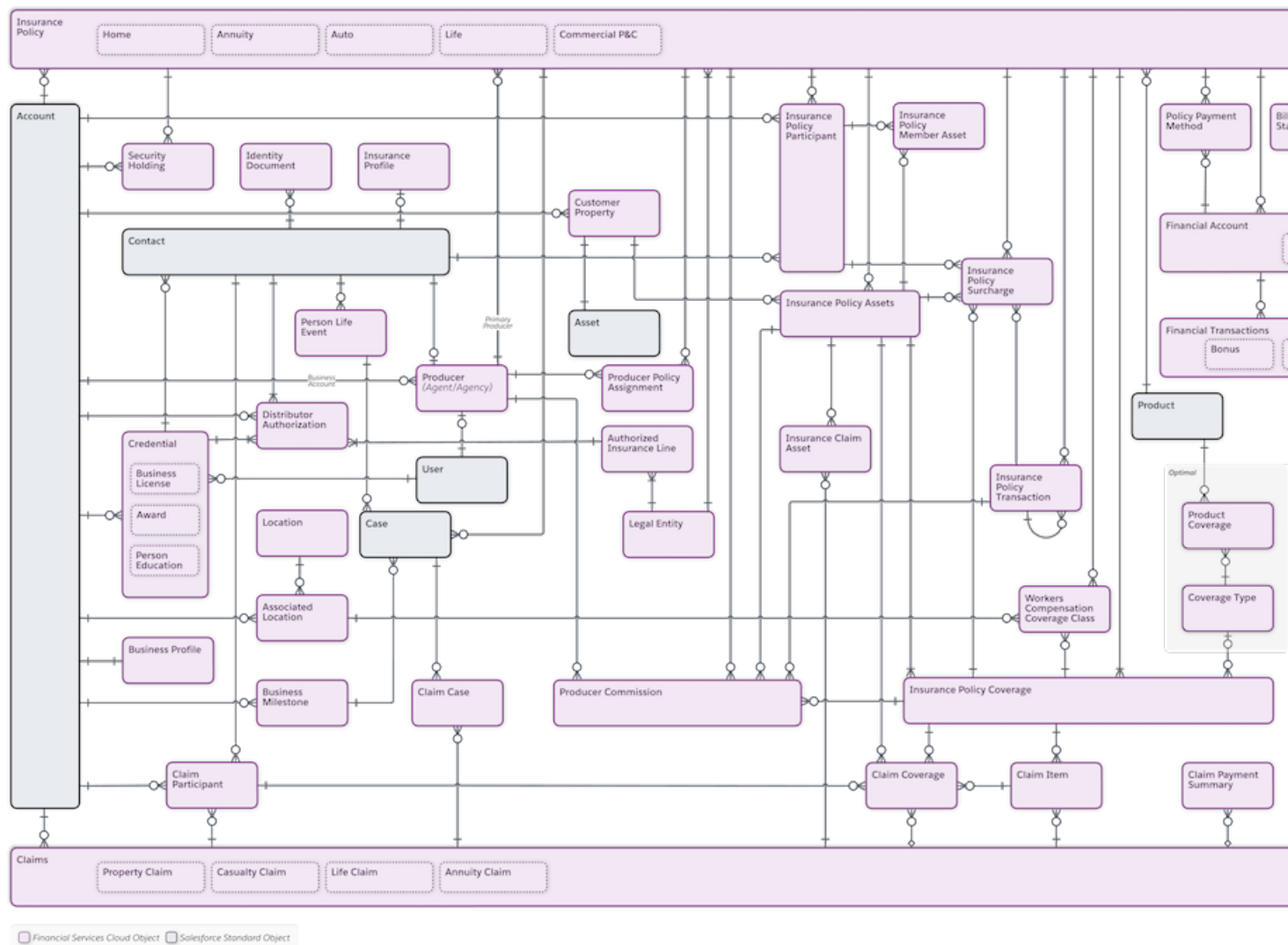
> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

1. From Setup, open Object Manager and locate Lead.

2. Open **Record Types** and click **New**.

3. In Existing Record Type, select **Referral**. Give the record type a label and add a description. In Lead Process select **Lead Process** and set the record type as active. Also, select the profiles to which the record type is available.

4. Save your changes.

5. From Setup, enter `metadata` in Quick Find, then select **Custom Metadata Types**.

6. Click **Referral Record Type Mapper** and **Manage Referral Record Type Mappers**.

7. Click **New**.

8. Complete the following information for the record type mapper:

    a. Enter a label.

    b. Don't change the automatically set name.

    c. Enter the API name of the Referral Record Type you added in step 3.

    d. Enter your org's namespace.

9. Save your changes.

The custom record type is now available to users with the assigned profiles when a lead or referral is created.

Add the Referral Component to Lightning Pages

You can add the referral component to Lightning pages to enable users to create specific referral record types. You can add multiple versions of the component to enable various referral record types to be created from a page.

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

2. Click **Clone** next to the Lightning Page you want to add the referral component to.

3. In the Search components box, enter *Referrals Create Form*.

4. Locate the Referrals Create Form component and drag it to an appropriate position on the page.

5. In Referral Record Type, select a referral record type.

6. As needed, repeat steps 3 through 5 to add a component for another referral record type.

7. Save your changes.

8. For the profiles that use the cloned page, activate the cloned page.

Show the Referrer Score Field to Experience Cloud Users

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

Profiles that provide Experience Cloud access for users include:

- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User

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

2. Click the name of the community user profile you want to update.

3. In Field-Level Security, click **View** next to User.

4. Click **Edit**.

5. Select Read Access for the Referrer Score field.

6. Save your changes and return to the profile.

7. In Field-Level Security, click **View** next to Contact.

8. Click **Edit**.

9. Select Read Access for the Referrer Score field.

10. Save your changes.

Set Up and Manage Insurance

Insurance for Financial Services Cloud includes a new data model for insurance, new Lightning components, and a tailored Lightning console app: Insurance Agent Console. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals. With the new distributor performance dashboard, reports, and performance metrics, sales managers can view a consolidated performance summary for all their distributors or monitor their individual performances. Use the Insurance Agent Portal template to create a portal that gives independent insurance agents access to the insurance features and components and lets them manage and grow their books of business.

When you add the Policy and Events or Milestones components to the account record page, agents have a consolidated view of their customers' life events or business milestones, insurance policies, claims, and other related details. The Policy component on the household page gives agents a consolidated view of household policies and claims. The Events or Milestones component on the contact record page gives sales managers an at-a-glance view of producers' life events. Producer relationship cards give sales managers easy access to key information about their producers.

Set Up Insurance for Financial Services Cloud

To enable Insurance for Financial Services Cloud, clone an Account record page or create one, and add the Policy and Events and Milestones components to the page. Then activate the page and assign it to the Insurance Agent Console app, appropriate account and person account record types, and appropriate user profiles. Add the Insurance Agent Action Items component to the Insurance Agent Console Home page. Then give users access to the Insurance Agent Console app.

Work with Insurance for Financial Services Cloud

Discover the information you need and the customizations you can do to fine-tune the Insurance features to best suit the needs of your agents and service reps.

Set Up Insurance for Financial Services Cloud

To enable Insurance for Financial Services Cloud, clone an Account record page or create one, and add the Policy and Events and Milestones components to the page. Then activate the page and assign it to the Insurance Agent Console app, appropriate account and person account record types, and appropriate user profiles. Add the Insurance Agent Action Items component to the Insurance Agent Console Home page. Then give users access to the Insurance Agent Console app.

Assign the FSC Insurance Permission Set License to Users

To access insurance objects and features, users need the FSC Insurance permission set license.

Give Users Access to Additional Objects and Functionality (Optional)

Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can't disable them.

Edit Sharing Settings for Insurance Objects

You can control access to data at different levels. For example, you can control the access that a user has to objects by assigning object permissions. Within an object, you can control which fields a user has access to by using field-level security. You can control access to data at the record level by assigning sharing settings. Review the default sharing settings for Insurance objects and modify them based on your needs.

Encrypt the Insurance Fields

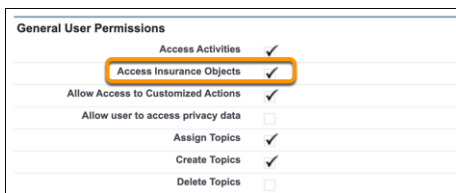Protect your policyholders' sensitive information with Shield Platform Encryption. You can encrypt information about a range of events, milestones, insurance policies, claims, and related details with either probabilistic or deterministic encryption schemes.

Give Agents a Consolidated View of Policyholders' Life Events, Policies, and Claims

Give your insurance agents a 360-degree view of their customers' life events or milestones, insurance policies, claims, and other important details. Start by cloning an Account record page or creating one. Then add the Policy and Events and Milestones components to the page.

Give Agents a Consolidated View of Household Policies and Claims

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

Enable Policy and Claim Record Rollups at Household Level

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

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

Add the provided rollup-by-lookup (RBL) summaries on the account household page layout to show total household policies, policy premiums, claims on policies, and claim amount paid by a policyholder's primary household. Then activate the RBL rules to calculate the summaries.

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

The Insurance Agent Action Items component gives agents an at-a-glance view of payment-due policies, policies up for renewal, open claims and cases, unread leads, and open opportunities. Add the component to the Insurance Agent Console app's home page.

Give Users Access to the Insurance Agent Console App

Add user profiles to the Insurance Agent Console app to give users access to the Insurance Agent Console app. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals.

Enable Distributor Performance Management

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

Manage Producers' Life Events

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

Provide Easy Access to Producer Information

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

Include Multi-Producer Policies in Metrics and Charts

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

Choose an Option for Metrics Calculations for Multiline Policies

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

Set Up a Portal for Independent Insurance Agents

Create a feature-rich portal for your independent insurance agents. A dashboard with performance metrics, report charts, and action items helps agents monitor their goals and accomplishments, meet deadlines, and improve sales and service. With a comprehensive view of clients' policies, claims, life events or business milestones, and other related details, agents can stay organized, deepen client relationships, and better address client needs. Agents can use built-in Experience Cloud and knowledge management features to share knowledge articles with other agents and insurance carriers.

FlexCard–Based Policy 360 Component for Financial Services Cloud

To configure the FlexCard-based Policy 360 component, assign OmniStudio permissions and the FSC Insurance permission set license to users, and customize the FlexCards, Integrations Procedures, and DataRaptors. FlexCards provide an improved user experience and simpler configurations. The FlexCard component can show contextualized information in an at-a-glance format. You can easily embed FlexCards in other FlexCards and show more details on demand by using a flyout. By using this comprehensive view, agents can easily scan the available details and resolve customer queries quickly.

Assign the FSC Insurance Permission Set License to Users

To access insurance objects and features, users need the FSC Insurance permission set license.

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

2. Click the user that you want to give permissions to.

3. Under Permission Set Assignments, click **Edit Assignments**.

4. Under Available Permission Sets, select **FSC Insurance**, and then click **Add**.

5. Save your changes.

> 📝 **Note:** Assigning the FSC Insurance permission set automatically assigns the user an FSC Insurance permission set license. However, assigning the permission set doesn't give the user permissions on insurance objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

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

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

Give Users Access to Additional Objects and Functionality (Optional)

Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can't disable them.

1. From Setup, in the Quick Find box, enter `Insurance Settings`, and then select **Insurance Settings**.

2. To give an agent access to the master list of coverage types, enable **Access Master List of Coverage Types**.

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

3. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable **Use Many-to-Many Relationships**.

   Once this option is enabled, you can see these additional objects: Claim Case, Insurance Claim Asset, and Insurance Policy Member Asset.

4. To let multiple producers work on the same policy, enable **Let Multiple Producers Work on the Same Policy**.

   Once this option is enabled, you can see an extra object, Producer Policy Assignment.

Edit Sharing Settings for Insurance Objects

You can control access to data at different levels. For example, you can control the access that a user has to objects by assigning object permissions. Within an object, you can control which fields a user has access to by using field-level security. You can control access to data at the record level by assigning sharing settings. Review the default sharing settings for Insurance objects and modify them based on your needs.

1. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

2. Under Organization-Wide Defaults, review the access levels for the following objects. By default, they are set to Private.

   - Business Milestone
   - Claim
   - Coverage Type (available when the Access Master List of Coverage Types org pref is enabled)
   - Customer Property
   - Insurance Policy
   - Insurance Policy Asset
   - Producer
   - Producer Policy Assignment (available when the Let Multiple Producers Work on the Same Policy org pref is enabled)
   - Product Coverage (available when the Access Master List of Coverage Types org pref is enabled)
   - Securities Holding
   - Worker Compensation Coverage Class

3. To change an access level, click **Edit**.

4. For each object, select the default access you want to use.

5. Save your changes.

Encrypt the Insurance Fields

Protect your policyholders' sensitive information with Shield Platform Encryption. You can encrypt information about a range of events, milestones, insurance policies, claims, and related details with either probabilistic or deterministic encryption schemes.

Table 5: Insurance Fields to Encrypt

Object	Fields You can Encrypt
BusinessMilestone	MilestoneName
Claim	- ClaimNumber - IncidentSite - ReportNumber
CustomerProperty	- Address - LienHolderName

Object	Fields You can Encrypt
IdentityDocument	• Name • ExpirationDate • IssueDate
InsurancePolicy	• PolicyNumber • ServicingOffice • UniversalPolicyNumber
PersonLifeEvent	EventName
SecuritiesHolding	Name

SEE ALSO:

Which Standard Fields Can I Encrypt?

Give Agents a Consolidated View of Policyholders' Life Events, Policies, and Claims

Give your insurance agents a 360-degree view of their customers' life events or milestones, insurance policies, claims, and other important details. Start by cloning an Account record page or creating one. Then add the Policy and Events and Milestones components to the page.

Create a Custom Account Record Page

To quickly create an Account record page, you can clone an existing one. After you create the page, you can modify it to give agents a customized view of their clients' records.

Configure Related Lists for Policies, Events, and Milestones

Before you add the Policy and Events and Milestones components to your Account record page, add the components as related lists on the relevant page layouts. To make the lists of insurance policies, claims, events, and milestones available on your custom Account record page, add the lists to the Related Lists sections of the page layouts for the Account, Person Account (if enabled), and Contact objects.

Add Policy and Events and Milestones Components to Your Account Record Page

Add the Policy and Events and Milestones components to your custom Account record page to give agents a consolidated view of their customers' life events or milestones, insurance policies, claims, and other related details.

Activate the Custom Account Record Page

Activate your custom Account record page to make it visible to your users.

Create a Custom Account Record Page

To quickly create an Account record page, you can clone an existing one. After you create the page, you can modify it to give agents a customized view of their clients' records.

1. From Setup, in the Quick Find box, enter `App Builder`, and then select **Lightning App Builder**.

2. Clone an Account record page. (An Account record page is a page whose object name is Account and type is Record Page.) If an Account record page is not available, create one.

3. Give your page an appropriate label. For example, name it `PolicyHolder 360`.

4. Save the page. When you save the page for the first time, you are prompted to activate it to make it available to users. Click **Not Yet**.

   You activate the page later when you are done customizing it and it's ready for your users.

Configure Related Lists for Policies, Events, and Milestones

Before you add the Policy and Events and Milestones components to your Account record page, add the components as related lists on the relevant page layouts. To make the lists of insurance policies, claims, events, and milestones available on your custom Account record page, add the lists to the Related Lists sections of the page layouts for the Account, Person Account (if enabled), and Contact objects.

1. From Setup, open **Object Manager**.

2. Click **Account**, and select **Page Layouts**.

3. For each page layout that you want to add the Insurance Policies list to, select **Related Lists** on the palette. Then drag **Insurance Policies** to the Related Lists section.

4. Save your changes.

5. Similarly, configure related lists for the relevant page layouts for the following objects.

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

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

SEE ALSO:

Work with Events and Milestones

Add Policy and Events and Milestones Components to Your Account Record Page

Add the Policy and Events and Milestones components to your custom Account record page to give agents a consolidated view of their customers' life events or milestones, insurance policies, claims, and other related details.

1. From Setup, in the Quick Find box, enter `App Builder`, and then select **Lightning App Builder**.

2. In the Lightning Pages list, click **Edit** next to your Account record page.

3. Drag the **Events and Milestones** component to the account summary.

4. Create a custom tab. Give it an appropriate label. For example, name it `Policies`.

5. Drag the **Policy** component to the new tab.

6. Click anywhere on the Policy component to select it.

7. In the Properties pane, review the preselected policy KPIs, and change them according to your needs.

8. In the Properties pane, under Choose Participant Role, click **Select**, and then select the appropriate participant roles.

   By default, no participant role is selected. As a result, when an agent views a user's record, the **Policies** tab shows only those policies that the user owns. Selecting participant roles includes policies in which the user is a participant but doesn't own. For example, if you select the **Beneficiary** participant role, the list includes the policies in which the user is a beneficiary.

9. Save your changes.

SEE ALSO:

Work with Events and Milestones

Show All Policies or Only Owned Policies

Activate the Custom Account Record Page

Activate your custom Account record page to make it visible to your users.

1. On your custom Account record page, click **Activation**.

2. Choose how you want to activate the page.

   - To make the page the default object record page for specific Lightning apps, click the **APP DEFAULT** tab and follow the steps. For example, you can make the page the default object record page for the Insurance Agent Console page.

   - To assign the page to a combination of Lightning apps, record types, and profiles, click the **APP, RECORD TYPE, AND PROFILE** tab and follow the steps. For example, you can assign the page to the Insurance Agent Console app, Person Account record type, and Insurance Agent profile.

Here's what your custom Account record page, PolicyHolder 360, looks like when an insurance agent views a client's record.
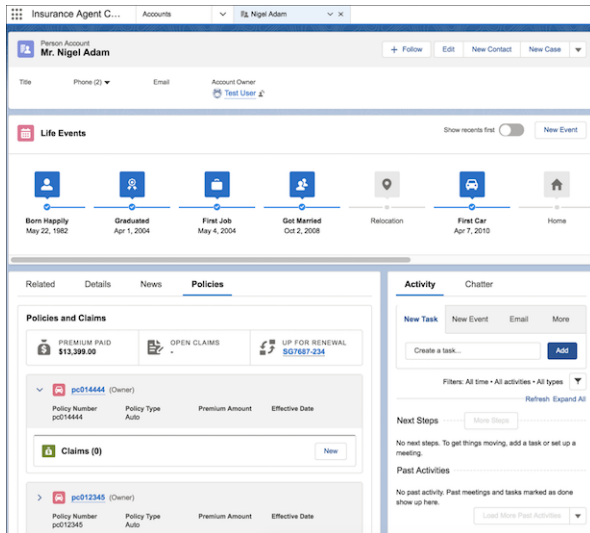
Give Agents a Consolidated View of Household Policies and Claims

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

- Ensure that you have created and configured custom record types for individuals and groups.
- Ensure that group record rollups are enabled and configured for optimal performance.

1. Give your users access to the Household field on the Claim, Insurance Policy, and Insurance Policy Participant objects.

   a. From Setup, open **Object Manager**.

   b. In the Quick Find box, enter `Claim`, then select **Claim**.

   c. Click **Fields & Relationships**, and select **Household**.

   d. Click **Set Field-Level Security**.

   e. Select **Visible** for all applicable user profiles.

   f. Save your changes.

   g. Repeat these steps for the Insurance Policy and Insurance Policy Participant objects.

2. Add the Household Insurance Policies, Household Insurance Policy Participants, and Household Claims related lists to the household page layout.

   a. From Setup, open **Object Manager**.

   b. Click **Account**, and select **Page Layouts**.

   c. Click **Account (Household) Layout**.

   d. On the palette, select **Related Lists**.

   e. Drag **Household Insurance Policies**, **Household Insurance Policy Participants**, and **Household Claims** to the Related Lists section on the page.

   f. Save your changes.

3. Add the Policy component to the household record page.

   a. On a household record page, from Setup, select **Edit Page**.

b. Drag the Policy component to the main region on the page. Or, add a custom tab and drag the Policy component to the new tab.

c. Click anywhere on the Policy component to select it.

d. In the Properties pane, review the preselected policy KPIs, and change them according to your needs.

e. In the Properties pane, under Choose Participant Role, click **Select**, and then select the appropriate participant roles.

By default, no participant role is selected. As a result, when an agent views a household record, the **Policies** component shows only those policies that the household members own. Selecting participant roles includes even those policies in which the household members are participants but don't own. For example, if you select the **Beneficiary** participant role, the list shows the policies that members own and the policies in which members are beneficiaries.

f. Save your changes.

SEE ALSO:

Create and Configure Custom Record Types for Individuals and Groups

Enable and Configure Group Record Rollups

Enable Policy and Claim Record Rollups at Household Level

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

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

1. From Setup, open **Object Manager**, and click **Account Contact Relationship**.

2. Click **Fields & Relationships**, and then select **Roll-Ups**.

3. Under Values, click **New**.

4. In the Roll-Ups field, enter these picklist values. Enter each value on its own line.

- *Insurance Policies*
- *Insurance Policy Participants*
- *Claims*
- *Claim Participants*

5. Click **Save**.

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

Add the provided rollup-by-lookup (RBL) summaries on the account household page layout to show total household policies, policy premiums, claims on policies, and claim amount paid by a policyholder's primary household. Then activate the RBL rules to calculate the summaries.

1. From the App Launcher, find and open **Rollup By Lookup Configurations**.

2. Change the list view to **All**.

3. For each of the following rules, select the check box in the Active column.

   - RBLForTotalNumberPoliciesHH

   - RBLForGWPHH

   - RBLForTotalNumberClaimHH

   - RBLForClaimPaidHH

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

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

The Insurance Agent Action Items component gives agents an at-a-glance view of payment-due policies, policies up for renewal, open claims and cases, unread leads, and open opportunities. Add the component to the Insurance Agent Console app's home page.

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

2. Drag the Insurance Agent Action Items component to the highlights panel or the side panel.

3. Click anywhere on the Insurance Agent Action Items component to select it.

4. In the Properties pane, choose up to four metrics to show on the home page.

5. Select a time period.

> EDITIONS
>
> Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.
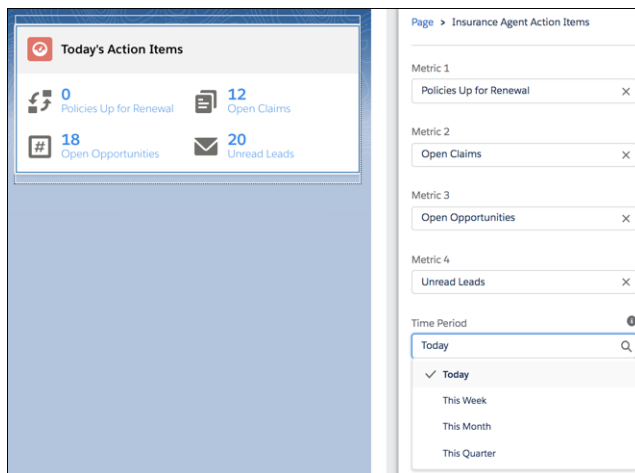
> 📝 **Note:** The time period that you select applies to only policy-related metrics. Other metrics related to cases, claims, leads, and opportunities display the total count irrespective of the time period.

6. Save your changes.

Give Users Access to the Insurance Agent Console App

Add user profiles to the Insurance Agent Console app to give users access to the Insurance Agent Console app. Insurance Agent Console helps agents and service reps track their performance and stay focused on their goals.

1. From Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.

2. On the Insurance Agent Console app's row, click ▼ , and then select **Edit**.

3. Under App Settings, click **User Profiles**.

4. Under Available Profiles, select a profile, and then click **Add**.

5. Save your changes.

Enable Distributor Performance Management

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

Deploy Distributor Performance Reports and Dashboard

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

Add Distributor Performance Dashboard and Metrics to a Home Page

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

Add Performance Metrics and Reports to Account and Contact Record Pages

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

Deploy Distributor Performance Reports and Dashboard

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

1. From Setup, in the Quick Find box, enter `Insurance Settings`, and then select **Insurance Settings**.

2. Enable **Deploy Distributor Performance Reports and Dashboard**.
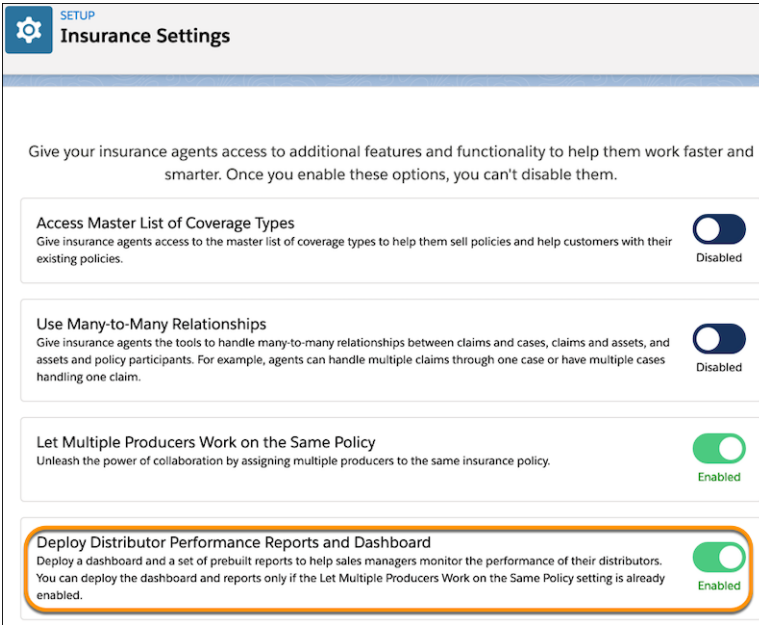
> ⚠ **Important:** This option is available only if API access is enabled in your org.

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

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

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

SEE ALSO:

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

Add Distributor Performance Dashboard and Metrics to a Home Page

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

1. Add the Distributor Performance Dashboard to the page.

   a. On the home page, from Setup, select **Edit Page**.

   b. Drag the Dashboard component to the page.

   c. Click anywhere on the component to select it.

   d. In the Properties pane, from the Dashboard list, select **Distributor Performance Dashboard**.

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

2. Add the Insurance Distributor Performance Metrics component to the page.

   a. Drag the Insurance Distributor Performance Metrics component to the page.

   b. Click anywhere on the component to select it.

   c. In the Properties pane, under Metrics, click **Select**.

   d. Select the metrics that you want to add to the component, and click **OK**.

   e. If you use the Producer Policy Assignment object to map both a single producer to a policy and multiple producers to a policy, select **Include policies with multiple producers**.

3. Save your changes.

SEE ALSO:

Include Multi-Producer Policies in Metrics and Charts

Add Performance Metrics and Reports to Account and Contact Record Pages

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

1. Add performance reports to an account or contact record page.

   a. On the record page, from Setup, select **Edit Page**.

   b. Drag the Report Chart component to the page.

   c. Click anywhere on the component to select it.

   d. In the Properties pane, from the Report list, select the report that you want to add to the component.

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

   e. From the Filter By list, select **Account ID** or **Contact ID**, depending on the record page you are on.

   f. Repeat steps 1.b through 1.e to add more reports to the page.

   > 💡 **Tip:** The performance reports are based on these provided custom report types.
   >
   > - Accounts with Contacts and Business Licenses
   > - Accounts with Contacts and Distributor Auth.
   > - Accounts with Multiproducer Policies
   > - Accounts with Multiproducer Policies and Claims
   > - Contacts with Multiproducer Policies
   > - Contacts with Multiproducer Policies and Claims

2. Add performance metrics to the account record page.

   a. Drag the Insurance Distributor Performance Metrics component to the page.

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

    b. Click anywhere on the component to select it.

    c. In the Properties pane, under Metrics, click **Select**.

    d. Select the metrics that you want to add to the component, and click **OK**.

        You can select up to six metrics.

    e. If you use the Producer Policy Assignment object to map both a single producer to a policy and multiple producers to a policy, select **Include policies with multiple producers**.

3. Save your changes.

SEE ALSO:

    Include Multi-Producer Policies in Metrics and Charts

    Manage Custom Report Types

Manage Producers' Life Events

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

1. On the contact record page, from Setup, select **Edit Page**.

2. Drag the Events and Milestones component to the page.

3. Save your changes.

SEE ALSO:

    Work with Events and Milestones

EDITIONS

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

Provide Easy Access to Producer Information

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

1. On the account or contact record page, from Setup, select **Edit Page**.

2. Drag the Relationship Card component to the page.

3. Click anywhere on the component to select it.

4. In the Properties pane, under Card Types, click **Select**.

5. Select **Producer Account Configuration** or **Producer Contact Configuration**, depending on the record page you are on.

6. Save your changes.

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

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions that have Financial Services Cloud enabled.
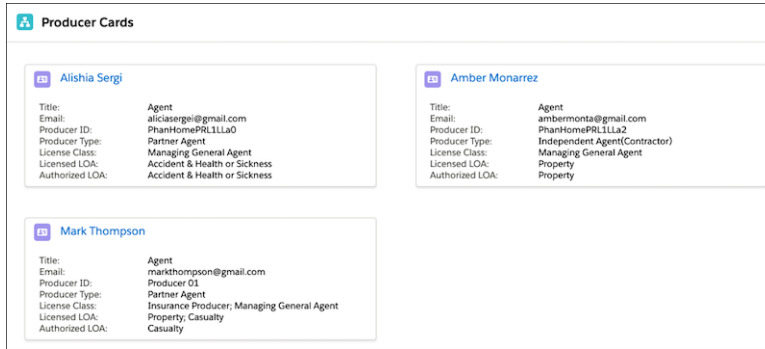
This table lists the labels on a producer card and their source fields.

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

Include Multi-Producer Policies in Metrics and Charts

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

1. On the home page or the record page, from Setup, select **Edit Page**.

2. Click anywhere on the component that contains the metrics or charts to select it.

   Here are the components that include policy-related metrics or report charts:

   - Insurance Distributor Performance Metrics
   - Insurance Agent Performance Metrics
   - Insurance Agent Action Items
   - Insurance Agent Reports

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

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

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

4. Save your changes.

Choose an Option for Metrics Calculations for Multiline Policies

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

1. From Setup, in the Quick Find box, enter `Insurance Settings`, and then select **Insurance Settings**.

2. Enable **Include Only Parent Policies When Counting Policies and Calculating Premiums**.
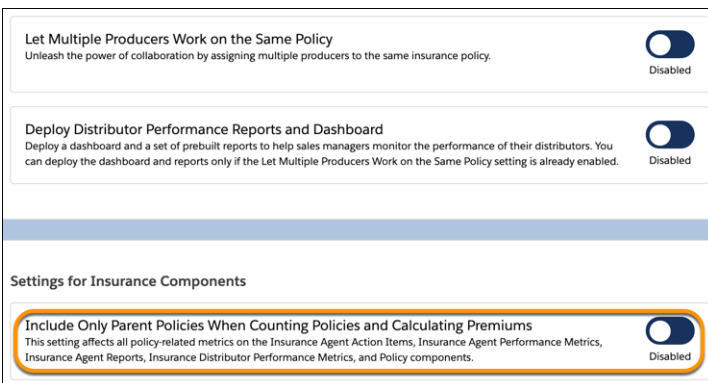
> 📝 Note: This change affects all policy-related metrics on the Insurance Agent Action Items, Insurance Agent Performance Metrics, Insurance Agent Reports, Insurance Distributor Performance Metrics, and Policy components.

Set Up a Portal for Independent Insurance Agents

Create a feature-rich portal for your independent insurance agents. A dashboard with performance metrics, report charts, and action items helps agents monitor their goals and accomplishments, meet deadlines, and improve sales and service. With a comprehensive view of clients' policies, claims, life events or business milestones, and other related details, agents can stay organized, deepen client relationships, and better address client needs. Agents can use built-in Experience Cloud and knowledge management features to share knowledge articles with other agents and insurance carriers.

Create a Portal for Agents

Use the Insurance Agent Portal Lightning template to create a portal for your independent insurance agents. Key Insurance features and all Insurance Lightning components are available and fully functional in the Insurance Agent Portal template.

Grant Users Access to the Portal

To access the features available in the portal, users need the Financial Services Community User permission set.

Grant Users Access to Producer and Insurance Policy Records

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

Create a Portal for Agents

Use the Insurance Agent Portal Lightning template to create a portal for your independent insurance agents. Key Insurance features and all Insurance Lightning components are available and fully functional in the Insurance Agent Portal template.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.

2. Click **New**.

3. Select the Insurance Agent Portal template, and click **Get Started**.

4. Enter a Name and a URL for the portal, and click **Create**.

5. Click **Builder**.

6. Customize the portal to suit your business needs, preview the customized portal, and then publish it.

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

Grant Users Access to the Portal

To access the features available in the portal, users need the Financial Services Community User permission set.

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

2. Click the user that you want to give permissions to.

3. Under Permission Set Assignments, click **Edit Assignments**.

4. Under Available Permission Sets, select **Financial Services Community User**, and then click **Add**.
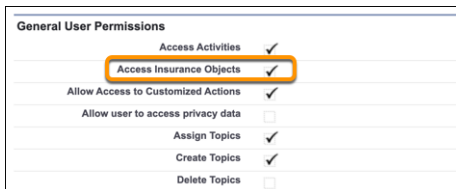
5. Save your changes.

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

> 📝 Note: Assigning the Financial Services Community User permission set automatically assigns the user a Financial Services Community permission set license. The permission set also grants the user access to the objects and components in the portal. However, it doesn't give any permissions on the objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

> 💡 Tip: The default profiles in the Financial Services Cloud don't have permissions on the insurance objects. To use these profiles for portal users, grant them create, read, edit, and delete permissions on the insurance objects.

Grant Users Access to Producer and Insurance Policy Records

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

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

FlexCard–Based Policy 360 Component for Financial Services Cloud

To configure the FlexCard-based Policy 360 component, assign OmniStudio permissions and the FSC Insurance permission set license to users, and customize the FlexCards, Integrations Procedures, and DataRaptors. FlexCards provide an improved user experience and simpler configurations. The FlexCard component can show contextualized information in an at-a-glance format. You can easily embed FlexCards in other FlexCards and show more details on demand by using a flyout. By using this comprehensive view, agents can easily scan the available details and resolve customer queries quickly.

Apart from supporting the capabilities of the existing Lightning-based Policy component for Insurance, the FlexCard-based Policy 360 component:

- Supports custom field and action configurations based on the policy type.
- Offers enhanced search capability based on insured item and policy number.
- Shows all policies associated with an individual irrespective of the role, such as policy holder and beneficiary.
- Supports a high volume of approximately 50–500 policies per account or household.

Perform these actions to set up the FlexCard-based Policy 360 component.

Assign the Permission Set License to FSC Insurance Users
To access insurance objects and features, users need the FSC Insurance permission set license.

Assign OmniStudio Permissions to FSC Insurance Users
Give users access to OmniStudio so that the users can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures.

Give FSC Insurance Users Access to Additional Objects (Optional)
Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can't disable them.

Customize the FlexCard–Based Policy 360 Component
Customize the OmniStudio FlexCards, Integration Procedures, and DataRaptors to suit your business needs.

Assign the Permission Set License to FSC Insurance Users

To access insurance objects and features, users need the FSC Insurance permission set license.

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

2. Click the user that you want to give permissions to.

3. Under Permission Set Assignments, click **Edit Assignments**.

4. Under Available Permission Sets, select **FSC Insurance**, and then click **Add**.

5. Save your changes.

📝 **Note:** Assigning the FSC Insurance permission set automatically assigns the user an FSC Insurance permission set license. However, assigning the permission set doesn't give the user permissions on insurance objects. You give users create, read, edit, and delete permissions on the objects through user profiles or permission sets.

💡 **Tip:** Your portal users can access insurance objects without requiring any additional permission set license. In your user profile, under General User Permissions, select **Access Insurance Objects**. However, to access insurance features, the portal users need the Financial Services Community permission set license.

Assign OmniStudio Permissions to FSC Insurance Users

Give users access to OmniStudio so that the users can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures.

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

2. Make sure that the OmniStudio Admin or OmniStudio User permission set is assigned to the users.

3. If a permission set isn't assigned to the users, in the Permission Set Assignments related list:

   a. Click **Edit Assignments**.

   b. Add the OmniStudio Admin or OmniStudio User permission set to Enabled Permission Sets.

   c. Save your changes.

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

Give FSC Insurance Users Access to Additional Objects (Optional)

Give agents access to the master list of coverage types. With access to this list, an agent can better sell policies and help customers with their existing policies. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable many-to-many relationships. For example, when many-to-many relationships are enabled, an agent can handle multiple claims through one case or have multiple cases handling one claim. Unlock the capability to let multiple producers work on the same policy. A large commercial insurance policy typically requires a team of agents and service reps to work in tandem to manage the policy. After you enable these options, you can't disable them.

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

1. From Setup, in the Quick Find box, enter `Insurance Settings`, and then select **Insurance Settings**.

2. To give an agent access to the master list of coverage types, enable **Access Master List of Coverage Types**.

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

3. To let an agent handle many-to-many relationships between claims and cases, claims and assets, and assets and policy participants, enable **Use Many-to-Many Relationships**.

After you enable this option, you can see these additional objects: Claim Case, Insurance Claim Asset, and Insurance Policy Member Asset.

4. To let multiple producers work on the same policy, enable **Let Multiple Producers Work on the Same Policy**.

   After you enable this option, you can see an extra object, Producer Policy Assignment.

Customize the FlexCard–Based Policy 360 Component

Customize the OmniStudio FlexCards, Integration Procedures, and DataRaptors to suit your business needs.

To start using the FlexCard-based Policy 360 component, customize the OmniStudio FlexCards, Integration Procedures, and DataRaptors, and then configure the component in Lightning Experience.

Customize FlexCard–Based Policy 360 Using FlexCards

To show policy information with clickable actions that change based on the information entered, customize the FlexCard components that you want to add to record pages.

Customize FlexCard–Based Policy 360 by Using Integration Procedures

Customize integration procedures in OmniStudio.

Customize FlexCard–Based Policy 360 Using DataRaptors

If you want to include policy and claim details from a third-party system, get your developer to create an Apex class that makes the data available to FlexCard-based Policy 360. Then customize the DataRaptors to reference the Apex class.

Configure FlexCard–Based Policy 360 in Lightning Experience

In Lightning App Builder, on the record page that you're editing or creating, drag FlexCard from the Components panel to the Lightning page canvas location where you want to position the component.

Customize FlexCard–Based Policy 360 Using FlexCards

To show policy information with clickable actions that change based on the information entered, customize the FlexCard components that you want to add to record pages.

FlexCard Designer is a declarative tool that you can use to easily build Lightning web components without code. Build a FlexCard by dragging the elements onto the Lightning page canvas. You can create UI components with FlexCards by sourcing the data and showing and organizing the output in a meaningful way.

Clone and customize these FlexCards:

EDITIONS

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

Parent FlexCards

    InsuranceFSCISEPolicy360_Salesforce

    InsuranceFSCISEPolicyTypeContainer_Salesforce

    InsuranceFSCISEPolicyContainer

    InsuranceFSCISEPolicyChild_Salesforce

Child FlexCards

    FlexCards for Consolidated View

        InsuranceFSCISEConsolidatedViewContainer_Salesforce

        InsuranceFSCISEConsolidatedViewChild_Salesforce

    FlexCards for Policy Versions

        InsuranceFSCISEPolicyVersionsContainer

        InsuranceFSCISEPolicyVersionsChild

    FlexCards for Policy Transactions

        InsuranceFSCISEPolicyTransactionsContainer_Salesforce

        InsuranceFSCISEPolicyTransactionsChild_Salesforce

    FlexCards for Policy Participants

        InsuranceFSCISEPolicyParticipantsContainer_Salesforce

        InsuranceFSCISEPolicyParticipantsChild_Salesforce

    FlexCards for Insured Items

        InsuranceFSCISEPolicyInsuredItemsContainer_Salesforce

        InsuranceFSCISEPolicyInsuredItemsChild_Salesforce

    FlexCards for Policy Record Alerts

        InsuranceFSCISEPolicyRecordAlertContainer

        InsuranceFSCISEPolicyRecordAlertCard

    FlexCard for Participant Roles

        InsuranceFSCISEOverviewRoleChild

    FlexCard for Policy Overview

        InsuranceFSCISEPolicyOverview

To customize a FlexCard:

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. Select and clone a card.

4. Customize and save the card.

5. Activate the card.

> ⛔ **Important:** Before you embed a child FlexCard in a parent FlexCard, always activate the child card.

SEE ALSO:
>   FlexCard Designer

Customize FlexCard–Based Policy 360 by Using Integration Procedures

Customize integration procedures in OmniStudio.

OmniStudio Integration Procedures are declarative, server-side processes that run multiple actions in a single-server call. Integration procedures can read and write data from Salesforce and from external systems by using REST API calls, and can call Apex code.

You can customize these integration procedures:

InsuranceFSCISE_GetConsolidatedPoliciesCount_Procedure
>   Customize the policy consolidation behavior, such as read, count, and merge policies for household and non household accounts.

InsuranceFSCISE_ReadAccountPolicies_Procedure
>   Customize the count of policies and policy filtering options based on the policy status.

InsuranceFSCISE_ReadAllPoliciesForConsolidatedView_Procedure
>   Customize the pagination behavior when you plan to show a consolidated view of all policies.

InsuranceFSCISE_ReadKPIdetails_Procedure
>   Customize the grouping and merging criteria for policies based on the policy status.

InsuranceFSCISE_ReadPoliciesForHouseholdAccount_Procedure
>   Customize the criteria to retrieve policies and assets related to household accounts.

InsuranceFSCISE_ReadPoliciesForNonHouseholdAccount_Procedure
>   Customize the criteria to retrieve policies and assets related to non household accounts.

InsuranceFSCISE_ReadPoliciesTypesFromAccount_Procedure
>   Customize the criteria to show the types of policies that are available for user accounts.

InsuranceFSCISE_ReadPolicyTransactions_Procedure
>   Customize the criteria to search for policy transactions.

To customize an integration procedure:

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio Integration Procedures**.

3. To customize an integration procedure, click the procedure.

SEE ALSO:
>   OmniStudio Integration Procedures

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

Customize FlexCard–Based Policy 360 Using DataRaptors

If you want to include policy and claim details from a third-party system, get your developer to create an Apex class that makes the data available to FlexCard-based Policy 360. Then customize the DataRaptors to reference the Apex class.

You can customize these DataRaptors as needed:

InsuranceFSCISEReadTransactionsByPolicyId

InsuranceFSCISEReadNonHouseholdTypesForFlyout

InsuranceFSCISEReadHouseholdKPI

InsuranceFSCISEReadNonHouseholdKPI

InsuranceFSCISEReadHouseholdTypesForFlyout

InsuranceFSCISEReadHouseholdAccPolicySearch

InsuranceFSCISEGetAccountRecordType

InsuranceFSCISEReadHouseholdPoliciesByInsuredId

InsuranceFSCISEReadPoliciesByInsuredId

InsuranceFSCISEReadParticipantsByPolicyId

InsuranceFSCISEReadHouseholdType

InsuranceFSCISEReadNonHouseholdType

InsuranceFSCISEGetPaginatedPoliciesForHousehold

InsuranceFSCISEGetPaginatedPoliciesForNonHousehold

InsuranceFSCISEReadVersionsByPolicyId

InsuranceFSCISEReadInsuredItemsByPolicyId

InsuranceFSCISEReadRecordAlertsByPolicyId

To customize a DataRaptor:

1. In the OmniStudio app, from the navigation bar, select **OmniStudio DataRaptors**.

2. Select the DataRaptor that you want to customize.

SEE ALSO:

OmniStudio DataRaptors

Configure FlexCard–Based Policy 360 in Lightning Experience

In Lightning App Builder, on the record page that you're editing or creating, drag FlexCard from the Components panel to the Lightning page canvas location where you want to position the component.

1. In the Properties pane, search for a component in the FlexCard Name field, and then select the card.

2. Save your changes.

3. If your page is new, activate the page.

EDITIONS

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

EDITIONS

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Work with Insurance for Financial Services Cloud

Discover the information you need and the customizations you can do to fine-tune the Insurance features to best suit the needs of your agents and service reps.

Customize the Insurance Agent Console Home Page

By default, the Insurance Agent Console app's home page shows various performance metrics and report charts. You can choose which metrics and charts to show based on your users' needs.

Events and Milestones

The Events and Milestones component shows life events for a person account or contact record page and business milestones for a business account record page. You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive event types and milestone types, create contextual actions for events and milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and milestones. Plus, you can choose the details your users see when they hover over an event or milestone.

Insurance Policies and Claims

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

Use the FlexCard–Based Policy 360 Component

In addition to supporting all the capabilities of the Policy Aura component, the FlexCard-Based Policy 360 component supports configuring contextualized fields and actions, searching policies by insured item and policy number, viewing all policies related to an individual irrespective of the role, and creating a high volume of policies up to 500 per account or household.

Create Action Plan Templates for Insurance Objects

You can create action plan templates for the Person Life Event, Milestone, Insurance Policy, Insurance Policy Coverage, and Claim objects. Use the action plan templates to capture repeatable tasks and automatically assign task owners and deadlines.

Considerations for Working with Insurance for Financial Services Cloud

Before you start using the features in Insurance for Financial Services Cloud, review these considerations.

Customize the Insurance Agent Console Home Page

By default, the Insurance Agent Console app's home page shows various performance metrics and report charts. You can choose which metrics and charts to show based on your users' needs.

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

2. Click anywhere on the Insurance Agent Performance Metrics component to select it.

3. In the Properties pane, choose up to five metrics to show on the home page.

4. Click anywhere on the Insurance Agent Performance Reports component to select it.

5. In the Properties pane, choose up to four charts to show on the home page.

6. Click anywhere on the Insurance Agent Action Items component to select it.

7. In the Properties pane, choose up to four metrics to show on the home page.

8. Select a time period.

   📝 Note: The time period that you select applies to only policy-related metrics. Other metrics related to cases, claims, leads, and opportunities display the total count irrespective of the time period.

9. Save your changes.

EDITIONS

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10. In the Page Saved dialog, click **Activate**. Or, click **Activation** on the home page.

11. On the APP AND PROFILE tab, click **Assign to Apps and Profiles**.

12. In the wizard, select **Insurance Agent Console**, select the appropriate profiles, and then click **Save**.

Here's what the Insurance Agent Console home page looks like.

Events and Milestones

The Events and Milestones component shows life events for a person account or contact record page and business milestones for a business account record page. You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive event types and milestone types, create contextual actions for events and milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and milestones. Plus, you can choose the details your users see when they hover over an event or milestone.

> 📝 **Note:** Event Type and Milestone picklist values are in English, but you can translate them using the Translation Workbench.

SEE ALSO:

[Work with Events and Milestones](#)

Insurance Policies and Claims

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

[Set a Custom Title for the Policy Component](#)
You can change the default title of the Policy component to a custom title that best indicates the information you choose to display.

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

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

Choose the Policy and Claim Details to Show on Hover

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

Show All Policies or Only Owned Policies

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

Expand or Collapse Policy Types by Default

On account record pages, policies are grouped by policy types. You can determine whether the policy types are expanded or collapsed when an account record page loads.

Show a Policy's Parent and Child Policies

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

Filter Policies by Policy Type

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

Set Policy Type Order

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

Filter Policies by Policy Record Type

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

Hide Policies' Related Claims

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

View an Account's or Household's Claims History

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

Map Insurance Policy Status Field Values to Inactive

Your users can choose from a variety Status values on an insurance policy. Many of these values mean that the policy is inactive. For each of these Status values, select the Inactive checkbox to map the value to Inactive.

Map Claim Status Field Values to Closed

Your users can choose from a variety Status values on a claim. Many of these values mean that the claim is closed. For each of these Status values, select the Closed checkbox to map the value to Closed.

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

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

Work with Quick Actions on Policy Records

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

Show Related Records from Multiple Policy-Related Objects

Give insurance agents a comprehensive view of clients' policies and claims. Financial Services Cloud enhancements show more detailed information. You can customize the Policy component to add an Insurance Policy Assets object as a related list for each policy record. Previously, you could add only the Claims object as a related list for policy records. The component displays the related records from these objects on separate tabs.

Show Policy-Related Details in an Enhanced Related List

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

Filter Policies to See Only Inactive Policies

Insurance agents need insights on clients' inactive policies to better serve them. To enable better client service, the Policy component shows all inactive policies.

Path Settings for Insurance Policy and Claim Objects

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

Configure Alerts for Policies and Claims

You can push alerts on clients' policies and claims from your core policy management system. Alerts appear when an agent views a client's policies or claims on the account page.

Use Custom Icons for Policy Types

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

Set a Custom Title for the Policy Component

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

1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, in the Title field, enter a title for component.

4. Save your changes.

EDITIONS

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

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

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

1. Choose the policy fields to show on the Policy component.

    a. From Setup, open **Object Manager**.

    b. In the Quick Find box, enter `Person Account`, and then select **Person Account**.

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   c. Click **Page Layouts**, and then select **Person Account Layout**.

   d. On the palette, select **Related Lists**.

   e. Under Related Lists, double-click the **Insurance Policies** related list or click the wrench icon (🔧).

   f. Under Columns, select up to 10 fields to include in the related list, and define the order in which the fields display. Select how to sort the records. The default is by record ID.

   g. Click **OK**. Your changes aren't saved until you save the page layout.

   h. Save the page layout.

2. Choose the claim fields to show on the Policy component.

   a. From Setup, open **Object Manager**.

   b. In the Quick Find box, enter `Insurance Policy`, and then select **Insurance Policy**.

   c. Click **Page Layouts**, and then select **Insurance Policy Layout**.

   d. On the palette, select **Related Lists**.

   e. Under Related Lists, double-click the **Claims** related list or click the wrench icon (🔧).

   f. Under Columns, select up to 10 fields to include in the related list, and define the order in which the fields display. Select how to sort the records. The default is by record ID.

   g. Click **OK**. Your changes aren't saved until you save the page layout.

   h. Save the page layout.

Choose the Policy and Claim Details to Show on Hover

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

1. Choose the policy fields to show in the expanded lookup card.

   a. From Setup, open **Object Manager**.

   b. Click **Insurance Policy**, and select **Compact Layouts**.

   c. Clone the System Default layout, or click **New** to create a compact layout.

   d. Enter a label for the compact layout, and add the fields to include.

   e. Sort the fields in the order that you want them displayed by clicking **Up** or **Down** arrow.

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

   f. Save the layout.

   g. Click **Compact Layout Assignment**, and then click **Edit Assignment**.

   h. From the Primary Compact Layout list, select your compact layout.

   i. Save your changes.

2. Choose the claim fields to show in the expanded lookup card.

   a. From Setup, open **Object Manager**.

   b. Click **Claim**, and select **Compact Layouts**.

EDITIONS

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

c. Clone the System Default layout, or click **New** to create a compact layout.

d. Enter a label for the compact layout, and add the fields to include.

e. Sort the fields in the order that you want them displayed by clicking **Up** or **Down** arrow.

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

f. Save the layout.

g. Click **Compact Layout Assignment**, and then click **Edit Assignment**.

h. From the Primary Compact Layout list, select your compact layout.

i. Save your changes.

Show All Policies or Only Owned Policies

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

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

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

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

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

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

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

SEE ALSO:

Expand or Collapse Policy Types by Default

On account record pages, policies are grouped by policy types. You can determine whether the policy types are expanded or collapsed when an account record page loads.

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

1. On the account record page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the Properties pane, select or deselect **Expand all policy types by default**.
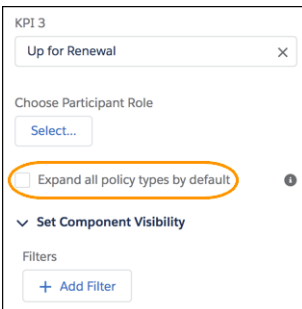
> **Note:** When this option is selected, the record page may take longer to load if the account has several policies.
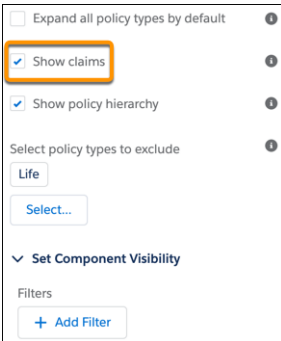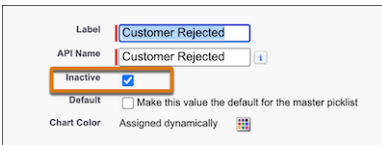
EDITIONS

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

Show a Policy's Parent and Child Policies

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

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

1. On the account record page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, select **Show policy hierarchy**.

4. Save your changes.

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

EDITIONS

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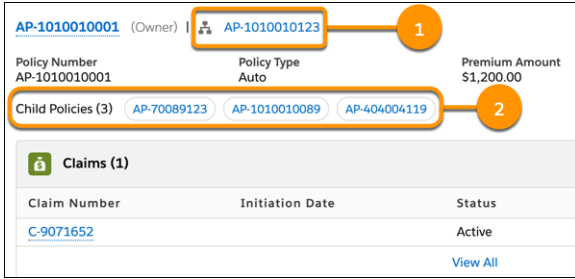
> 💡 **Tip:** Depending on its position on the record page (main region or sidebar), the Policy component shows a maximum of five or two child policies. To view the full list of child policies, click ⋯ .
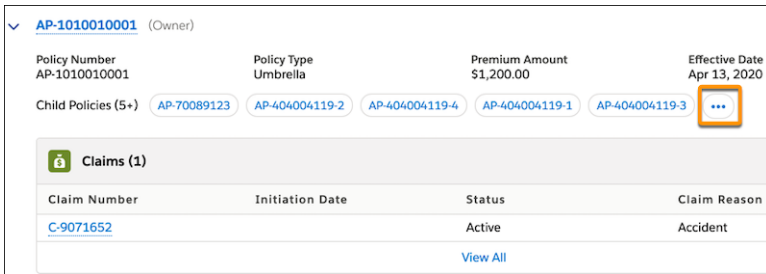
Filter Policies by Policy Type

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

1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, under Select policy types to exclude, click **Select**.

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

EDITIONS

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

84
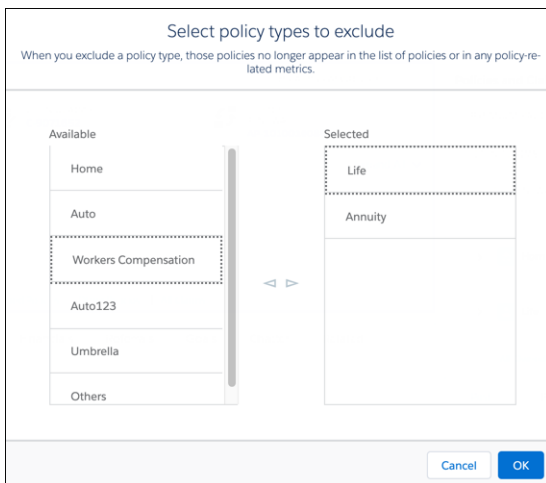
5. Save your changes.

Set Policy Type Order

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

1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, under Set Policy Types Order, click **Select**.

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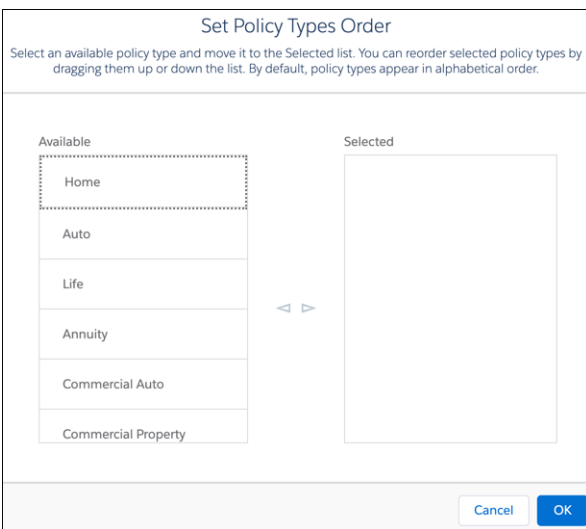
5. Save your changes.

Filter Policies by Policy Record Type

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

1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, under Select policy record types to exclude, click **Select**.

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

5. Save your changes.

Hide Policies' Related Claims

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

1. On the account record page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, deselect **Show claims**.
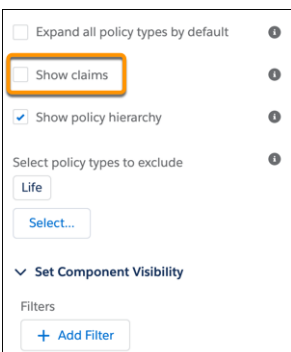
4. Save your changes.

View an Account's or Household's Claims History

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

1. On the account record page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, select **Show claims**.

4. Save your changes.

Map Insurance Policy Status Field Values to Inactive

Your users can choose from a variety Status values on an insurance policy. Many of these values mean that the policy is inactive. For each of these Status values, select the Inactive checkbox to map the value to Inactive.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Insurance Policy`, and then select **Insurance Policy**.

3. Click **Fields & Relationships**, and then select **Status**.

4. Under Status Picklist Values, next to the value that you want to map, click **Edit**, and select **Inactive**.

5. Save your changes.

Map Claim Status Field Values to Closed

Your users can choose from a variety Status values on a claim. Many of these values mean that the claim is closed. For each of these Status values, select the Closed checkbox to map the value to Closed.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Claim`, and select **Claim**.

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

4. Under Status Picklist Values, next to the value that you want to map, click **Edit**, and select **Closed**.

5. Save your changes.

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

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

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

1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, depending on the record page, override the default value of the text fields. The default values are Custom Link Text for All Owned Policies, Custom Link Text for Other Policies, Custom Link Text for All Policies, or Custom Link Text for All Claims.

4. Save your changes.

Work with Quick Actions on Policy Records

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

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

<div style="float:right">

EDITIONS

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

</div>

Show Related Records from Multiple Policy-Related Objects

Give insurance agents a comprehensive view of clients' policies and claims. Financial Services Cloud enhancements show more detailed information. You can customize the Policy component to add an Insurance Policy Assets object as a related list for each policy record. Previously, you could add only the Claims object as a related list for policy records. The component displays the related records from these objects on separate tabs.

<div style="float:right">

EDITIONS

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

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1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, under Select policy-related objects for tabs, click **Select**.

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

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

5. Save your changes.

Show Policy-Related Details in an Enhanced Related List

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

<div style="float:right">

EDITIONS

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

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1. On an account or household page, from Setup, select **Edit Page**.

2. Click anywhere on the Policy component to select it.

3. In the properties pane, select **Show Enhanced List**.

4. Save your changes.

Filter Policies to See Only Inactive Policies

Insurance agents need insights on clients' inactive policies to better serve them. To enable better client service, the Policy component shows all inactive policies.

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

<div style="float:right">

EDITIONS

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

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Path Settings for Insurance Policy and Claim Objects

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

Configure Alerts for Policies and Claims

You can push alerts on clients' policies and claims from your core policy management system. Alerts appear when an agent views a client's policies or claims on the account page.

Use Custom Icons for Policy Types

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

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

2. Select **Insurance Policies**.

3. For the icon that you want to change, click ▼ , and select **Change Icon**.

4. Click **Upload Files**, and select the SVG file for the icon.

5. Save your changes.

Use the FlexCard–Based Policy 360 Component

In addition to supporting all the capabilities of the Policy Aura component, the FlexCard-Based Policy 360 component supports configuring contextualized fields and actions, searching policies by insured item and policy number, viewing all policies related to an individual irrespective of the role, and creating a high volume of policies up to 500 per account or household.

For information about how to use the component's capabilities, see Insurance Policies and Claims.

Create Action Plan Templates for Insurance Objects

You can create action plan templates for the Person Life Event, Milestone, Insurance Policy, Insurance Policy Coverage, and Claim objects. Use the action plan templates to capture repeatable tasks and automatically assign task owners and deadlines.

SEE ALSO:

> Action Plans

Considerations for Working with Insurance for Financial Services Cloud

Before you start using the features in Insurance for Financial Services Cloud, review these considerations.

> Considerations for Metrics and Charts
> Review these points to better understand the information that appears in charts and metrics on various Lightning components and in the deployed distribution performance reports.
>
> Considerations for Policies and Claims
> Review these points to better understand the information that appears on the Policy component.
>
> Considerations for Events and Milestones
> Review these points to better understand the information that appears on the Events and Milestones component.

Considerations for Metrics and Charts

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

Report Charts on the Insurance Agent Reports Component

- The charts group policies and policy premiums by policy type. Policies without a policy type are grouped under a type represented by a hyphen (-).
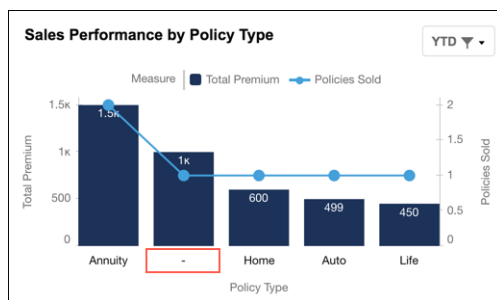
- By default, the MTD (Month to Date) filter is applied to the charts wherever applicable. Although MTD signifies Month to Date, it includes records for the entire month and not just from the first of the month to the current date. Similarly, QTD (Quarter to Date) and YTD (Year to Date) include data for the entire quarter and year.
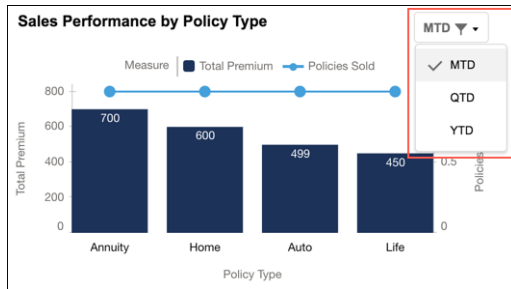
- Filter selections don't persist across user sessions. They are reset to MTD the next time you log in.

- The sale-related charts include all new policies irrespective of whether they are active or inactive.

- When calculating the renewal-related charts, the following conditions apply.

   - Only active policies are counted.

   - If both the DateRenewed and PreviousRenewalDate values are available, DateRenewed is used to calculate the metrics and charts.

   - Only the most recent renewal of a policy in the selected time period is counted. For example, in a quarter, if five of an agent's six policies were renewed once and the sixth policy was renewed once every month of the quarter, the Policies Renewed metric shows six renewals for that quarter.

- When a policy is renewed, depending on how policy records are managed in your Salesforce org, perform one of these steps to ensure that the renewal-related charts are correctly calculated.

   - If a new record is created for each renewal of the policy, mark the old policy record inactive (IsActive = False).

   - If the same record is updated for every renewal of the policy, clear the DateRenewed field after the new policy comes into effect.

- A chart includes a record only when certain fields in that record are populated and they match the criteria specific to that metric or chart. For example, when drawing the Sales Performance by Policy Type chart, a policy is counted only when it meets all of these criteria:

   - The policy has a producer (ProducerId) associated with it, and the InternalUserId on the Producer object is mapped to the logged-in user.

   - The date on which the policy was sold (SaleDate) is within the selected time period (MTD, QTD, or YTD).

   - The policy is a new policy and not a renewed policy (IsRenewedPolicy = False).

Use this table to learn how charts are calculated.

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

Table 6: Report Charts on the Insurance Agent Reports Component

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Sales Performance by Policy Type	The number of policies sold and the sum of the premium for those policies. The records are grouped by policy type.	Number of policies sold = COUNT (Id) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND	Number of policies sold = COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
		IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium) Total premium = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)	WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium) Total premium = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Selected Time Period, GROUP BY PolicyType, ORDER BY SUM (GrossWrittenPremium)
Renewals Performance by Policy Type	The number of policies renewed and the sum of the premium for those policies. The records are grouped by policy type.	Premium for policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True, GROUP BY PolicyType Premium for policies yet to be renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND (RenewalDate OR FinalRenewalDate IN Selected Time Period) AND DateRenewed = NULL AND IsActive = True, GROUP BY PolicyType	Premium for policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (DateRenewed OR PreviousRenewalDate IN Selected Time Period) AND IsActive = True, GROUP BY PolicyType Premium for policies yet to be renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND (RenewalDate OR FinalRenewalDate IN Selected Time Period) AND DateRenewed = NULL AND IsActive = True, GROUP BY PolicyType

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Monthly Sales and Renewals	The sum of the premium for the policies sold and policies renewed in the past twelve months. The records are grouped by month.	Policies sold = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsRenewedPolicy = False AND SaleDate IN Last 12 Months, GROUP BY Calendar_Year (SaleDate), Calendar_Month (SaleDate), ORDER BY Calendar_Year (SaleDate), Calendar_Month (SaleDate) Policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND IsActive = True AND (DateRenewed OR PreviousRenewalDate IN Last 12 Months) AND DateRenewed = NULL, GROUP BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed), ORDER BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed)	Policies sold = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsRenewedPolicy = False AND SaleDate IN Last 12 Months, GROUP BY Calendar_Year (SaleDate), Calendar_Month (SaleDate), ORDER BY Calendar_Year (SaleDate), Calendar_Month (SaleDate) Policies renewed = SUM (GrossWrittenPremium) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND IsActive = True AND (DateRenewed OR PreviousRenewalDate IN Last 12 Months) AND DateRenewed = NULL, GROUP BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed), ORDER BY Calendar_Year (DateRenewed), Calendar_Month (DateRenewed)
Average Opportunity Closure Time	The average time the agent took to close an opportunity. The records are grouped by policy type.	AVG (SourceOpportunity.CloseDate - SourceOpportunity.CreatedDate) FROM InsurancePolicy WHERE Producer.InternalUserId = Current User AND SourceOpportunity.CloseDate IN Last 6 Months, GROUP BY Calendar_Month (SourceOpportunity.CloseDate), ORDER BY Calendar_Month (SourceOpportunity.CloseDate)	AVG (SourceOpportunity.CloseDate - SourceOpportunity.CreatedDate) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId from ProducerPolicyAssignment WHERE Producer.InternalUserId = Current User) AND SourceOpportunity.CloseDate IN Last 6 Months, GROUP BY Calendar_Month (SourceOpportunity.CloseDate), ORDER BY Calendar_Month (SourceOpportunity.CloseDate)

Report Chart	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Cases Closed and Average Closure Time	The number of cases closed by the service rep and the average time taken to close a case. The records are grouped by case type.	Cases closed = COUNT (Id) FROM Case WHERE OwnerId = Current User AND Status = Closed AND ClosedDate IN Selected Time Period, ORDER BY Type Average closure time = AVG (ClosedDate - CreatedDate) WHERE Status = Closed AND OwnerID = Current User AND ClosedDate IN Selected Time Period, ORDER BY Type	Same as Without ProducerPolicyAssignment
Claims Settled and Average Settlement Time	The number of claims settled by the service rep and the average time taken to settle a claim. The records are grouped by claim type.	Claims settled = COUNT (Id) FROM Claim WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType Average settlement time = AVG (InitiationDate - FinalizedDate) WHERE OwnerId = Current User AND IsClosed = True AND FinalizedDate IN Selected Time Period, ORDER BY ClaimType	Same as Without ProducerPolicyAssignment

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

- By default, the MTD (Month to Date) filter is applied to the metrics. Although MTD signifies Month to Date, it includes records for the entire month and not just from the first of the month to the current date. Similarly, QTD (Quarter to Date) and YTD (Year to Date) include data for the entire quarter and year.

- Filter selections don't persist across user sessions. They are reset to MTD the next time you log in.

- In metrics, currency ISO codes are used in place of currency symbols. For example, the Premium of Policies Sold metric shows USD 2500 instead of $2500.

- The sale-related metrics include all new policies irrespective of whether they are active or inactive.

- When calculating the renewal-related metrics, the following conditions apply.

  - Only active policies are counted.

- – If both the DateRenewed and PreviousRenewalDate values are available, DateRenewed is used to calculate the metrics and charts.
- – Only the most recent renewal of a policy in the selected time period is counted. For example, in a quarter, if five of an agent's six policies were renewed once and the sixth policy was renewed once every month of the quarter, the Policies Renewed metric shows six renewals for that quarter.

- When a policy is renewed, depending on how policy records are managed in your Salesforce org, perform one of these steps to ensure that the renewal-related metrics are correctly calculated.

  - – If a new record is created for each renewal of the policy, mark the old policy record inactive (IsActive = False).
  - – If the same record is updated for every renewal of the policy, clear the DateRenewed field after the new policy comes into effect.

- A metric includes a record only when certain fields in that record are populated and they match the criteria specific to that metric or chart. For example, when calculating the Policies Sold metric, a policy is counted only when it meets all of these criteria:

  - – The policy has a producer (ProducerId) associated with it, and the InternalUserId on the Producer object is mapped to the logged-in user.
  - – The date on which the policy was sold (SaleDate) is within the selected time period (MTD, QTD, or YTD).
  - – The policy is a new policy and not a renewed policy (IsRenewedPolicy = False).

Use this table to learn how metrics are calculated.

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

Table 7: Insurance Agent Performance Metrics

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

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

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

Table 8: Distributor Performance Metrics on a Sales Manager's Home Page

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Policies Sold	The number of policies sold by all distributors that the sales manager owns.	COUNT (Id) FROM InsurancePolicy WHERE Producer.Account.OwnerId = Current User AND IsRenewedPolicy = FALSE AND SaleDate IN Selected Time Period	COUNT (Id) FROM InsurancePolicy WHERE Id IN (SELECT InsurancePolicyId FROM ProducerPolicyAssignment WHERE Producer.Account.OwnerId = Current User) AND IsRenewedPolicy = FALSE AND SaleDate IN Selected Time Period

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

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

Table 9: Distributor Performance Metrics on a Distributor's (Account) Record Page

Metric	Description	Calculation (Without ProducerPolicyAssignment)	Calculation (With ProducerPolicyAssignment)
Policies Sold	The number of policies sold by the distributor.	COUNT (Id) FROM InsurancePolicy WHERE	COUNT (Id) FROM InsurancePolicy WHERE Id IN

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

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

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

Metrics on the Insurance Agent Action Items Component

- The policy-related metrics include only active policies.

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

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

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

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

Considerations for Policies and Claims

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

- When you hover over the Open Claims KPI, the expanded lookup card shows a View All link only when three or more claims are open. The View All link opens the Claims list view. You can edit the compact layout for the Claim object to include more fields on the lookup card.

- When you hover over the Up for Renewal KPI, the expanded lookup card shows a View All link only when three or more policies are up for renewal. The View All link opens the Insurance Policies list view. You can edit the compact layout for the Insurance Policy object to include more fields on the lookup card.

- A KPI includes a record only when certain fields in that record are populated and they match the criteria specific to that KPI. For example, when calculating Premium Paid, a policy is counted only when it meets all these criteria:

   - The policy is owned by the user whose records you are viewing.

   - The policy is active (IsActive = True).

Use this table to learn how KPIs are calculated.

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

Considerations for Events and Milestones

Review these points to better understand the information that appears on the Events and Milestones component.

- When you convert a person account to a business account, you retain the associated life events. However, they don't appear as business milestones; they are on the Related tab on the account record page.

- When you convert a business account to a person account, it deletes the associated business milestones.

- If you have marked an event type or milestone type unique, you can have only one event or milestone of that type, including the expired event or milestone.

Set Up and Manage Mortgage

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

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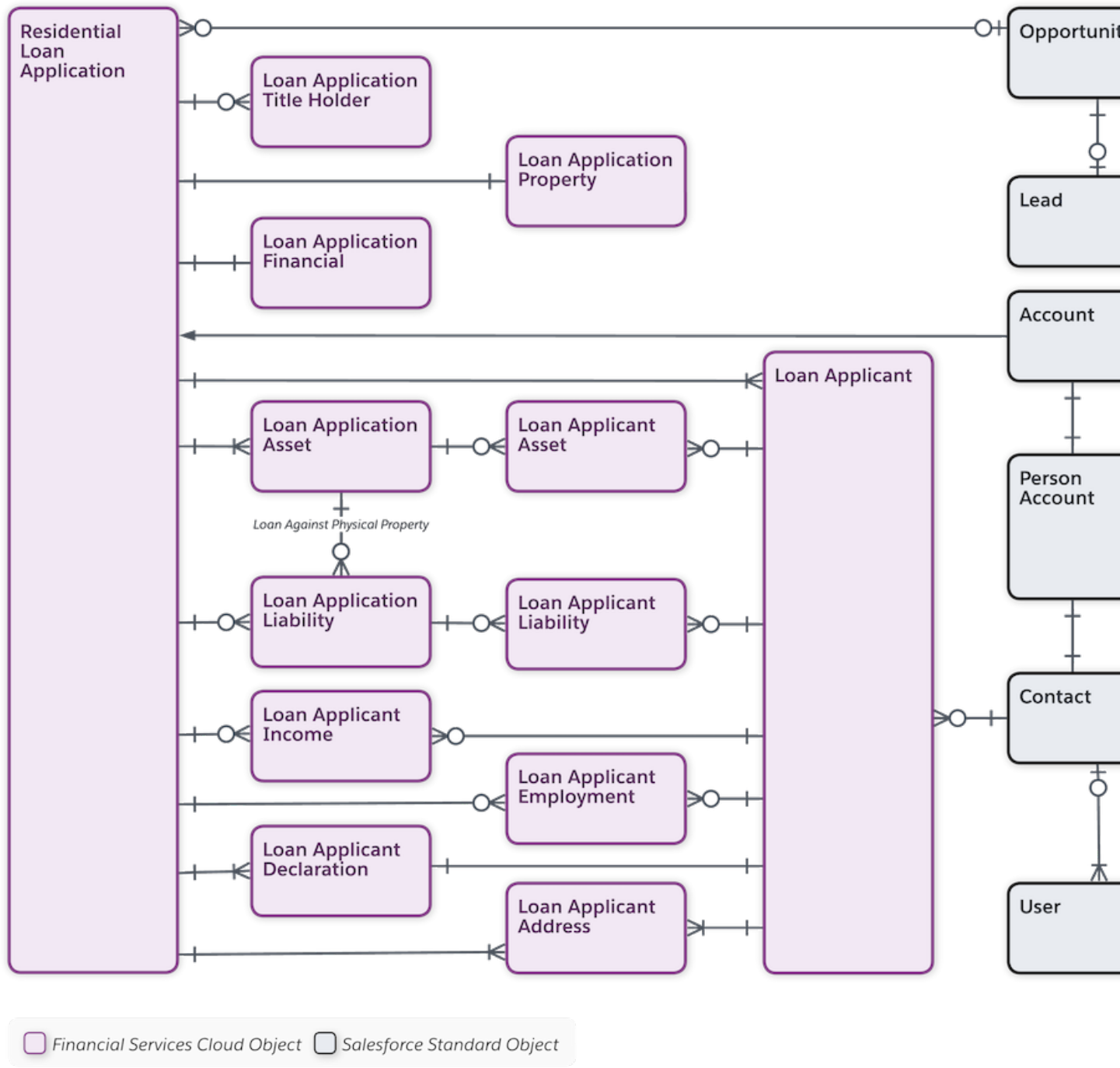
Financial Services Cloud Object   Salesforce Standard Object

Give Your Users Access to Mortgage Features

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

Set Up Borrower Access to Mortgage Applications in Communities

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

Solution Kits for Mortgage

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

Give Your Users Access to Mortgage Features

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

Assign the Mortgage Permission Set

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

Create Enhanced Mortgage User Permission Sets

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

Create and Assign Mortgage User Profiles

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

Set Up Account Sharing

Use sharing settings to control user access to mortgage records.

Update Residential Loan Application Page Layout

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

Create a Sharing Set

Give Experience Cloud site users access to mortgage records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. For example, grant site users access to all Residential Loan Application records related to an account that's identified on the user's contact records.

Add the Section Summary View Component to the Residential Loan Application

The Section Summary View component shows borrower loan information on the Residential Loan Application page. The information is displayed in expandable sections that correspond to the Residential Loan Application.

Create and Assign Role

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

Set Up Action and Recommendations List

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

Set Up and Use Mortgage Record Creation Settings

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

Mortgage Record Creation Settings

The Mortgage Settings define which records are created when you run the Create Financial Records process on a Residential Loan Application.

Assign the Mortgage Permission Set

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

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. On the Permission Sets Setup page, click the name of the mortgage permission set with a Mortgage license that you want to assign.

3. Click **Manage Assignments** and then click **Add Assignments**.

4. Select the users who need access to the Mortgage license, click **Assign**, and click **Done**.

5. On the Permission Sets Setup page, click the name of the document checklist permission set with a Document Checklist license that you want to assign.

6. Click **Manage Assignments** and then click **Add Assignments**.

7. Select the users who need access to the Document Checklist license, click **Assign**, and click **Done**.

Create Enhanced Mortgage User Permission Sets

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

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

Create and Assign a Loan Officer Permission Set

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

Create and Assign an Underwriter Permission Set

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

Create and Assign a Loan Officer Permission Set

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

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. On the Permission Sets Setup page, click **New**.

3. Name the permission set `Loan Officer`, set License to **None**, and then click **Save**.

4. On the Loan Officer Permission Set page, under Apps, click **App Permissions**, and click **Edit**.

5. Under Call Center, enable **Manage Customer Users**, and save.

6. In the drop-down list to the right of App Permissions, select **System Permissions** and then click **Edit**.

7. Under System, enable Run Flows, User license to access mortgage in Financial Services Cloud, and User license to access the Document Checklist features.

8. In the drop-down list to the right of System Permissions, select **Object Settings**.

9. In the Find Settings box, enter `Document Checklist Items`, click **Document Checklist Items**, and then click **Edit**.

10. Enable Read, Create, Edit, and Delete and click **Save**.

11. Repeat steps 11 and 12 for the remaining mortgage objects.

- Loan Applicant Addresses
- Loan Applicant Assets
- Loan Applicant Declarations
- Loan Applicant Employments
- Loan Applicant Incomes
- Loan Applicant Liabilities
- Loan Applicants
- Loan Application Assets
- Loan Application Financials
- Loan Application Liabilities
- Loan Application Properties
- Loan Application Title Holders
- Residential Loan Applications

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

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

Create and Assign an Underwriter Permission Set

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

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. On the Permission Sets Setup page, click **New**.

3. Name the permission set `Underwriter`, set License to **None**, and then click **Save**.

4. On the Underwriter Permission Set page, under System, click **System Permissions**, and then click **Edit**.

5. Under System, enable User license to access mortgage in Financial Services Cloud and User license to access the Document Checklist features.

6. Click **Save**.

7. On the Underwriter Permission Set page, in the Find Settings box, enter `Document Checklist Items`, click **Document Checklist Items**, and then click **Edit**.

8. Enable Read, Create, and Edit and then click **Save**.

9. On the Underwriter Permission Set page, in the Find Settings box, enter `Loan Applicant Addresses`, click **Loan Applicant Addresses**, and then click **Edit**.

10. Enable Read and click **Save**.

11. Repeat steps 9 and 10 for the remaining mortgage objects.

- Loan Applicant Assets
- Loan Applicant Declarations
- Loan Applicant Employments
- Loan Applicant Incomes
- Loan Applicant Liabilities
- Loan Applicants
- Loan Application Assets
- Loan Application Financials
- Loan Application Liabilities
- Loan Application Properties
- Loan Application Title Holders
- Residential Loan Applications.

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

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

Create and Assign Mortgage User Profiles

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

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

2. On the Profiles page, clone the Standard User profile.

3. On the Clone Profile page, enter `Loan Officer` for the cloned profile name and save.

4. From Setup, select **Users** > **Users**.

5. Click **Edit** next to the user that you want to assign the loan officer profile to.

6. On the User Edit page, select the loan officer profile from the Profile drop-down list and click **Save**.

7. From Setup, in the Quick Find box, enter `Profiles`, then select **Profiles**.

8. On the Profiles page, clone the Standard User profile.

9. On the Clone Profile page, enter `Underwriter` for the cloned profile name and save.

10. From Setup, select **User** > **User**.

11. Click **Edit** next to the user that you want to assign the underwriter profile to.

12. On the User Edit page, select the underwriter profile from the Profile drop-down list and click **Save**.

Set Up Account Sharing

Use sharing settings to control user access to mortgage records.

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

👁 **Example:** This examples sets up Account Teams for sharing.

1. From Setup, in the Quick Find box, enter `Account Teams`, and then select **Account Teams**.

2. If account teams are disabled, enable account teams for your organization.

   a. On the Account Team Setup page, click **Enable Account Teams**, select **Account Teams Enabled**, and then click **Save**.

   b. On the Page Layout Selection page, select the page layout used by your mortgage teams, enable Add to users' customized related lists, and save.

3. On the Account Team Setup page, click **Team Roles**.

4. On the Team Role Picklist Edit page, click **New**.

5. Enter `Loan Officer`, `Underwriter`, and other mortgage-related team roles at your company each on their own lines and save.

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

SEE ALSO:

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

Update Residential Loan Application Page Layout

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

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Residential Loan Application`, then click **Residential Loan Application**.

3. Click **Page Layouts** and then select the Residential Loan Application layout that your mortgage users see.

4. On the palette, select **Related Lists**.

5. Drag the following objects from the palette to the Related Lists section:

   - Loan Applicants
   - Loan Applicant Addresses
   - Loan Applicant Declarations
   - Loan Applicant Employments
   - Loan Applicant Incomes
   - Loan Application Assets
   - Loan Application Financials

- Loan Application Liabilities
- Loan Application Properties
- Loan Application Title Holders
- Document Checklist Items

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

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

SEE ALSO:

    Update Opportunity and Account Page Layouts

Create a Sharing Set

Give Experience Cloud site users access to mortgage records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. For example, grant site users access to all Residential Loan Application records related to an account that's identified on the user's contact records.

Follow the steps in Create a Sharing Set for the mortgage objects that you want to grant access to. You can use sharing sets with these objects:

- LoanApplicant
- LoanApplicantDeclaration
- LoanApplicantEmployment
- LoanApplicantIncome
- LoanApplicationAsset
- LoanApplicationLiability
- ResidentialLoanApplication

EDITIONS
Financial Services Cloud is available in Lightning Experience.
Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Add the Section Summary View Component to the Residential Loan Application

The Section Summary View component shows borrower loan information on the Residential Loan Application page. The information is displayed in expandable sections that correspond to the Residential Loan Application.

1. On the Residential Loan Application page, go to Lightning App Builder.

2. In the Components search, enter `Section Summary View – Financial Services Cloud.`

3. Drag the Section Summary View component onto the record page.

4. In the Properties pane, update the label for each section, or leave it blank to use the default value.

5. Save your changes.

6. If your page is new, activate the page.

EDITIONS
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Create and Assign Role

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

1. Create a loan officer role.

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

   a. From Setup, in the Quick Find box, enter `Roles`, and then select **Roles**.

   b. Click **Set Up Roles**.

   c. On the Creating the Role Hierarchy page, find the role that the loan officer role reports to and click **Add Role** beneath it.

   d. Enter a label for the new role, select the appropriate Opportunity Access, and save.

2. Assign a role to loan officers.

   a. On the Creating the Role Hierarchy page, click **Assign** next to the role you want to assign.

   b. Under Available Users Search, select **All Unassigned**.

   c. Select the desired users, click **Add**, and save.

Set Up Action and Recommendations List

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

1. From Setup, in the Quick Find box, enter `Recommendations`, and select **Actions & Recommendations**.

2. Click **New Deployment** and then click **Next**.

3. Enter a label and an API name for your deployment, select **Flows and quick actions**, and click **Next**.

4. Under Available Objects, enter `Residential Loan Application` and select **Residential Loan Application**.

5. To add Residential Loan Application to the Selected Objects list, click the right arrow and click **Next**.

6. Under All Actions, drag the **Lender Loan Information - Flow** or your customized lender loan flow into the Top Pinned Actions & Recommendations box and click **Next**.

7. Under All Actions, drag the **Borrower Information - Flow** or your customized borrower flow into the Top Pinned Actions & Recommendations box.

8. Under All Actions, drag the **Assets and Liabilities - Flow** or your customized assets and liabilities flow into the Top Pinned Actions & Recommendations box.

9. On the Select actions to add page, click the checkbox to the left of Action Label to deselect all actions.

10. Under Action Label, select Assets and Liabilities, Borrower Information, Lender Loan Information and other actions that you want available from a Residential Loan Application record.

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

11. Click **Save** and then click **Go to Lightning App Builder**.

12. On the Lightning App Builder page, click **New**.

13. Select **Record Page**, and click **Next**.

14. Enter `Residential Loan Application Record Page` for label, set Object to `Residential Loan Application`, and click **Next**.

15. Click **CLONE SALESFORCE DEFAULT PAGE** and then click **Done**.

16. Drag the Actions & Recommendations component into the right column.

17. In the Actions & Recommendations properties pane, set Actions & Recommendations Deployment to the deployment you created.

18. Click **Save** and then click **Activate**.

19. On the Activation page, click **Assign as Org Default**, and then click **Save**.

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

SEE ALSO:

> Set Up Document Types

Set Up and Use Mortgage Record Creation Settings

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

1. Enable the mortgage settings.

    a. From Setup, in the Quick Find box, enter `Mortgage`, and then select **Mortgage Settings**.

    a. Review the setting descriptions. Decide which records to generate when the Create Financial Records process runs for a closed loan application.

    b. Click **Enable** for each type of record to create.

2. Confirm the quick action on the record page.

    a. From Setup, click **Object Manager**.

    b. Click **Residential Loan Application**.

    c. Click **Page Layouts**.

    d. Click **Mobile & Lightning Actions**.

    e. Expand the Salesforce Mobile and Lightning Experience Actions section.

    f. Confirm that the Create Financial Records action is on the record page. If it's not, add the action to the record page and save your changes.

3. Create a record.

    a. On the Residential Loan Application record page click **Create Financial Records**.

Financial Records are created based on the mortgage settings creation settings enabled by your Salesforce admin.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Mortgage Record Creation Settings

The Mortgage Settings define which records are created when you run the Create Financial Records process on a Residential Loan Application.

Setting	Description
Asset Record for New Home	Create an asset record from a loan application property record to represent the new home that was acquired. The new asset record includes the property value, and relates to the primary owner's account.
Liability Record for New Home	Create a liability record from a loan application property record to represent the new mortgage loan. The new liability record includes the mortgage loan amount, and relates to the primary owner's account.
Financial Account Record for New Mortgage	Create a financial account record that represents the mortgage loan. The new financial account record includes the interest rate, terms, and outstanding loan balance.
Financial Account Record for New Home	Create a financial account record from the loan application property to represent the new home. The new financial account record includes the property value, and relates to the primary owner's account.
Customer Property Record for New Home	Create a customer property record from a loan application property record to represent the new home. The new customer property record includes the property value and address, and relates to the primary owner's account.
Asset Records for Loan Application Assets	Create asset records from the assets listed in the loan application.
Financial Account Records for Loan Application Assets	Create financial account records from the assets listed in the loan application.
Liability Records for Loan Application Liabilities	Create liability records from the liabilities listed in the loan application.
Financial Account Records for Loan Application Liabilities	Create financial account records from the liabilities listed in the loan application
Edit Residential Loan Application for Account Read-Only Users	Allow users to edit residential loan applications even if they have read-only access to accounts .

Setting	Description
Loan Applicant	Automatically generate a loan applicant record for a new residential loan application that's associated with a person account.
Loan Applicant Addresses	Generate address records for the related account's addresses. Only applies when also generating a loan applicant record.
Override Mortgage Custom Sharing with Standard Salesforce Sharing	Use standard Salesforce sharing for residential loan applications and other mortgage objects. When this setting is turned on, access is no longer granted to a mortgage object from its account. The Edit Residential Loan Application for Account Read-Only Users setting is ignored.

Set Up Borrower Access to Mortgage Applications in Communities

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

Create a Community User Profile for Borrowers

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

Assign the Borrower Profile to a Community

Assign the borrower profile to your customer community.

Update Community Pages

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

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

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

Create a Community User Profile for Borrowers

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

Ensure that communities are enabled for your organization.

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

2. On the Profiles page, click **Clone** next to the Customer Community Login User, the Customer Community Plus Login User, the Customer Community Plus User, or the Customer Community User profile.

3. On the Clone Profile page, enter `Borrower` for the cloned profile name and save.

4. On the Borrower Profile page, click **Edit**.

5. Under General User Permissions, enable Run Flows.

6. Under Standard Object Permissions, enable read access for Document Checklist Item.

7. Under Standard Object Permissions, enable read, create, edit, and delete access for Loan Applicants, Loan Applicant Addresses, Loan Applicant Assets, Loan Applicant Declarations, Loan Applicant Employments, Loan Applicant Incomes, Loan Applicant Liabilities, Loan Application Assets, Loan Application Financials, Loan Application Liabilities, Loan Application Properties, Loan Application Title Holders, and Residential Loan Applications.

8. Click **Save**.

Assign the Borrower Profile to a Community

Assign the borrower profile to your customer community.

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

1. From Setup, in the Quick Find box, enter `Communities`, then select **All Communities**.

2. On the All Communities page, click **Workspaces** next to the community you want to assign the borrower profile to.

3. Click the **Administration** tile.

4. Click **Members** in the left pane.

5. Under Select Profiles, select **Customer** in the search drop-down list.

6. Under Available Profiles, select **Borrower**, click **Add**, and then click **Save**.

Update Community Pages

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

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

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

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

Update Community Home Page

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

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

1. From Setup, in the Quick Find box, enter `Communities`, and then select **All Communities**.

2. On the All Communities page, click **Builder** next to the community where you want to update the home page.

3. On the Home page, drag the Record List component onto the page.

4. In the Record List property window, set Object Name to Residential Loan Application.

5. Publish the changes to your community.

Update Community Record Detail Page

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

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

1. From Setup, in the Quick Find box, enter `Communities`, and then select **All Communities**.

2. On the All Communities page, click **Builder** next to the community where you want to update the record detail page.

3. On the Home page, click the drop-down arrow to the right of Home and select **Record Detail**.

4. Drag the Flow component onto the page.

5. In the Flow property window, set Flow to the name of your borrower flow and enable Pass record ID into this variable.

6. Drag another Flow component onto the page.

7. In the Flow property window, set Flow to the name of your assets and liabilities flow and enable Pass record ID into this variable.

8. Repeat steps 6 and 7 for other mortgage flows that you want your users to fill out.

9. Drag the Record List component onto the page.

10. In the Record List property window, set Object Name to **Document Checklist Item**.

11. Publish the changes to your community.

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

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

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

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

API names are indicated in parentheses.

Object Name (API Name)	Components		
	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Loan Applicant (LoanApplicant)	✅	✅	✅
Loan Applicant Address (LoanApplicantAddress)	✅	✅	✅
Loan Applicant Asset (LoanApplicantAsset)			

Object Name (API Name)	Components		
	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Loan Applicant Declaration (LoanApplicantDeclaration)	✅	✅	✅
Loan Applicant Employment (LoanApplicantEmployment)	✅	✅	✅
Loan Applicant Income (LoanApplicantIncome)	✅	✅	✅
Loan Applicant Liability (LoanApplicantLiability)			
Loan Application Asset (LoanApplicationAsset)	✅	✅	✅
Loan Application Financial (LoanApplicationFinancial)	✅	✅	✅
Loan Application Liability (LoanApplicationLiability)	✅	✅	✅
Loan Application Property (LoanApplicationProperty)	✅	✅	✅
Loan Application Title Holder (LoanApplicationTitleHolder)	✅	✅	✅
Residential Loan Application (ResidentialLoanApplication)	✅	✅	✅

📝 **Note:** To be searchable in Experience Cloud sites, objects must be searchable in Lightning Experience and supported in templates.

SEE ALSO:

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

Solution Kits for Mortgage

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

Every solution kit gives you:

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

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

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

SEE ALSO:

   Salesforce Help: Loan Forbearance Solution Kit

Set Up and Manage Retail Banking

Get a 360-degree view of customers with Retail Banking, a Financial Services Cloud Lightning app. Bankers can also easily manage high-volume transactions on one screen with the Retail Banking Console. The information bankers need is supported with new objects, fields, and record types for loans, deposits, and more.

Follow these steps to enable Retail Banking features.

Create a Personal Banker Profile

Create a Personal Banker profile to define the permissions and field-level security settings for all personal banker users.

Enable Personal Banker Profile Permissions

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

Assign the Teller Access Permission Set (Optional)

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

Set Object Field Permissions for the Personal Banker Profile

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

Add the Retail Banking Field Sets

Using the Retail Banking field sets, you can customize the details displayed for various objects and record types. If you have not customized the field sets, add the Retail Banking field sets by installing the unmanaged package. However, if you have customized the field sets, add the Retail Banking field sets manually.

Assign Page Layouts to New Financial Account Record Types

The Financial Accounts object includes new record types, such as Checking Account and Auto Loan, to support banking needs. These record types have customized page layouts that optimally display information for each account type.

Update Lightning Page Layouts for the Banking Home Page and Retail Banking Console

Lightning pages designed to help personal bankers see their key data and tasks are included with Retail Banking. Follow these steps to set up these pages for various record types and the user's home page.

Add Personal Banker Users

Add Personal Banker users and assign them the Personal Banker profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

Streamline Your Customer Onboarding Experience

Give your users access to a prebuilt sample app that streamlines the customer onboarding process. The sample app includes OmniScripts, Flows, Integration Procedures, DataRaptors, and other components that can be deployed to your Salesforce org and customized to meet your unique onboarding needs.

Create a Personal Banker Profile

Create a Personal Banker profile to define the permissions and field-level security settings for all personal banker users.

📝 **Note:** To set up profiles for other bank employees, create profiles and modify the permissions to provide the appropriate level of access.

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

2. Click **New**.

3. From the Existing Profile list, select **Standard User**.

4. Enter a profile name, such as *Personal Banker*.

5. Save your changes.

Enable Personal Banker Profile Permissions

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

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

2. Select the **Personal Banker** profile, click **Edit**, and update the following:

   - Under Custom App Settings:
     - Enable the Retail Banking Console app and set it as the default.

   - Under Tab Settings, Custom Tab Settings:
     - Education: Default Off
     - Employment: Default Off
     - Financial holdings: Default Off
     - Identification documents: Default Off
     - Securities: Default Off

   - Under Administrative Permissions:
     - Enable View Dashboards in Public Folders
     - Enable View Reports in Public Folders

   - Under General User Permissions:
     - Enable: Manage Leads
     - Enable: Report Builder
     - Enable: Transfer Leads
     - Enable: View My Team's Dashboards

3. Save your changes.

4. Under Field-Level Security, select **View next to Task**. Edit the task and enable read access for the Type field. Save your changes and go back to the profile.

5. Under Record Type Settings, verify the following:

- Contact defaults to Individuals.

- Events includes Advisor Event and defaults to Advisor Event.

- Leads includes Referral and defaults to Referral.

- Billing Statements includes Credit and Debit and defaults to Credit.

- Financial Account Types include Auto Loan, Checking Account, Credit Card, HELOC, Loan Account, Mortgage, Savings Account, and General Account, and defaults to Checking Account.

- Opportunities defaults to General.

- Tasks includes Advisor Task and defaults to Advisor Task.

Assign the Teller Access Permission Set (Optional)

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

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

2. Click **New Profile**.

3. For Existing Profile select **Standard User**.

4. Enter a profile a name, such as `Teller`.

5. Save your changes.

6. From **Setup**, in the Quick Find box, enter `Users`, and then select **Users**.

7. Click the user to be assigned the teller profile.

8. Click **Edit**, and set Profile to `Teller`.

9. Save your changes.

10. Under Permission Set Assignments, click **Edit Assignments**.

11. Assign the Financial Services Cloud Basic and Teller Access permission sets.

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

12. Save your changes.

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

Objects	Access
Account Account Relationship	Read, Create, Edit
Alerts	Read, Edit, Delete, View All, Modify All
Assets and Liabilities	Read
Billing Statements	Read
Cards	Read
Charges and Fees	Read

Objects	Access
Contact Contact Relationship	Read, Create, Edit
Education	Read, Edit, Delete
Employment	Read
Financial Account Roles	Read
Financial Accounts	Read
Financial Account Transactions	Read
Financial Goals	Read
Financial Holdings	Read
Identification Documents	Read
Life Events	Read
Reciprocal Roles	Read
Revenues	Read
Rollup By Lookup Configurations	Read
Rollup By Lookup Filter Criteria	Read
Securities	Read

Set Object Field Permissions for the Personal Banker Profile

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

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

2. Click the **Personal Banker** profile name.

3. Assign the required field-level access for the Account object.

    a. Under Standard Field-Level Security in the Field-Level Security section, click **View** next to Account.

    b. For each Account field in the Object Field Permissions table, enable the listed Read Access and Edit Access.

4. Save your changes.

5. Assign the required field-level access for the Contact object.

    a. Under Standard Field-Level Security in the Field-Level Security section, click **View** next to Contact.

    b. For each Contact field in the Object Field Permissions table, enable the listed Read Access and Edit Access.

6. Save your changes.

Table 10: Object Field Permissions

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

Add the Retail Banking Field Sets

Using the Retail Banking field sets, you can customize the details displayed for various objects and record types. If you have not customized the field sets, add the Retail Banking field sets by installing the unmanaged package. However, if you have customized the field sets, add the Retail Banking field sets manually.

📝 **Note:** If you've made just a few customizations to your field sets, we recommend that you make a note of these customizations, install the unmanaged package, and then reapply the customizations.

Reinstall the Unmanaged Package
To add the Retail Banking field sets, first remove the unmanaged package from your installation and then install the latest unmanaged package.

Create Field Sets for Retail Banking
When you heavily customize field sets in your implementation, it's easier to add the Retail Banking field sets than install the unmanaged package and reapply your customizations.

Reinstall the Unmanaged Package

To add the Retail Banking field sets, first remove the unmanaged package from your installation and then install the latest unmanaged package.

📝 **Note:** If you've made just a few customizations to your field sets, we recommend that you make a note of these customizations, install the unmanaged package, and then reapply the customizations.

Install the unmanaged package as follows:

1. To remove the unmanaged package:

   a. From Setup, enter `Installed` in Quick Find, then select **Installed Packages**.

   b. Next to the Financial Services Cloud unmanaged package, click **Uninstall**.

   c. Select **Yes, I want to uninstall** and click **Uninstall**.

2. To install the unmanaged package:

   a. Locate the link to the Financial Services Cloud unmanaged package in the Product Specific Terms section of your order form.

   b. Copy the URL for the unmanaged package into your browser navigation bar and press **Enter**.

   c. Enter the password you received from Salesforce.

   d. Select **Install for Specific Profiles...**

   e. Scroll down to the Personal Banker profile. Set the Access Level to Full Access. This step maps the cloned profile that you created to the Personal Banker profile provided in the package.

   f. Select **Install**.

      If it takes a while, you can select **Done** and move on to do something else while the installation finishes. Check your email for confirmation that the installation was successful.

   g. Verify the installation of the unmanaged package.

      a. From Setup, enter `Installed Packages` in Quick Find, then select **Installed Packages**.
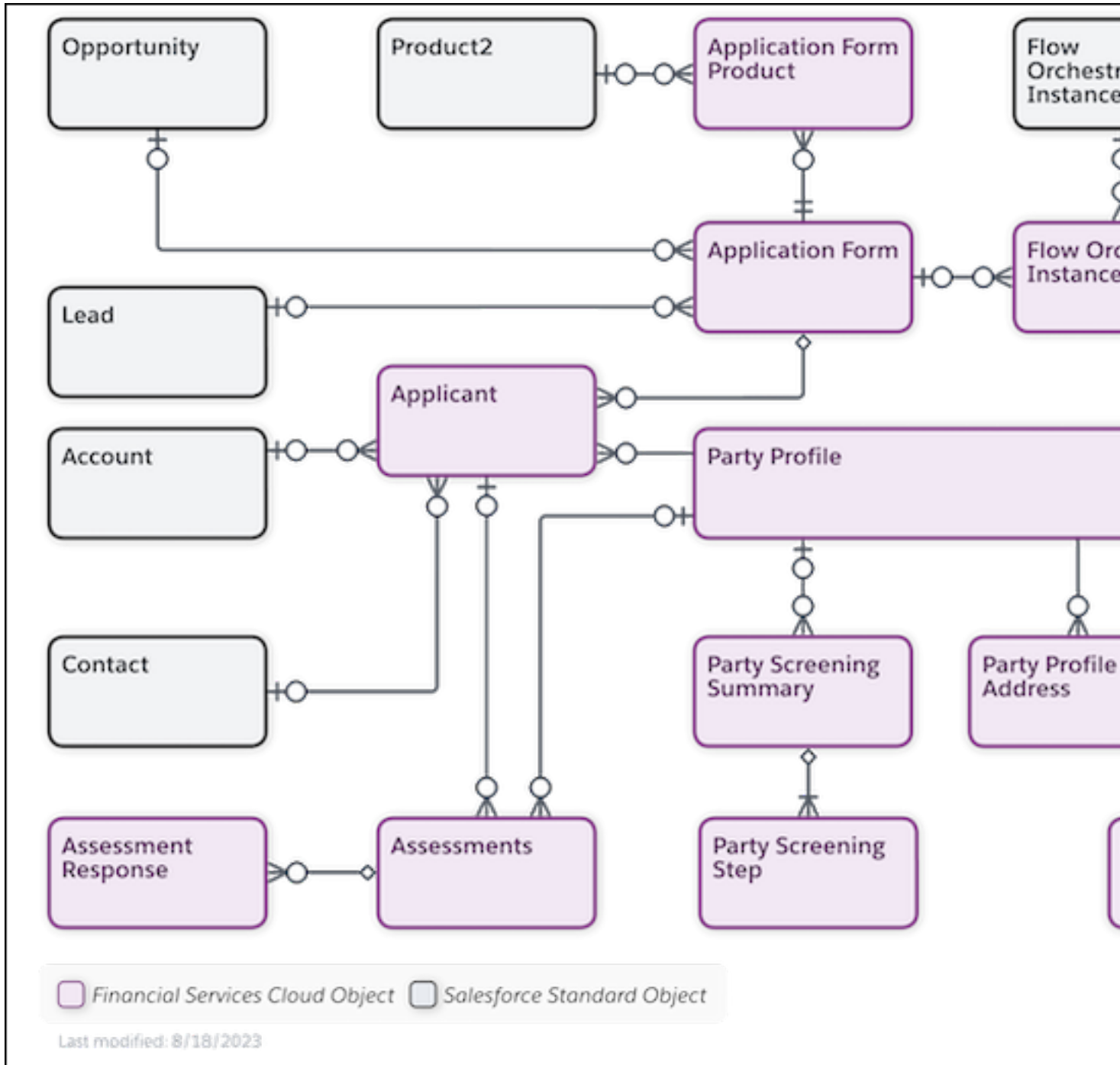
      b. Look for **Financial Services Ext**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Create Field Sets for Retail Banking

When you heavily customize field sets in your implementation, it's easier to add the Retail Banking field sets than install the unmanaged package and reapply your customizations.

[Create Account Field Set for Retail Banking](#)
Create a custom field set to include account information on the personal banker profile's Financials tab.

[Create Financial Account Field Sets for Retail Banking](#)
Create custom field sets to include financial account information on the Financials tab for client and household profiles.

[Create Lead Field Sets for Retail Banking](#)
Create custom field sets to include lead information on the global referral form and the client profile's Referrals tab.

Create Account Field Set for Retail Banking

Create a custom field set to include account information on the personal banker profile's Financials tab.

1. From the object management settings for accounts, go to Field Sets, and then click **New**.

2. Enter *Financial Accounts Summary* as the **Field Set Label**.

3. Enter *FSC_Banker_Profile_Fin_Acct_Summary* as the **Field Set Name**.

4. Enter *Personal Banker profile's Financials tab* in the **Where is this used?** field.

5. Save your changes.

6. Drag these fields from the palette, and then drop them in the **In the Field Set** container: Total Bank Deposits (Name: TotalBankDeposits), Total Outstanding Credit (Name: TotalOutstandingCredit), and Total Number of Financial Accounts (Name: TotalNumberOfFinAccounts).

7. Save your changes.

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

Create Financial Account Field Sets for Retail Banking

Create custom field sets to include financial account information on the Financials tab for client and household profiles.

1. From the object management settings for financial accounts, go to Field Sets, and then click **New**.

2. Enter *Auto Loan Account* as the **Field Set Label**.

3. Enter *FSC_Client_AutoLoan* as the **Field Set Name**.

4. Enter *Client profile's Financials tab* in the **Where is this used?** field.

5. Save your changes.

6. Drag these fields from the palette, and then drop them in the **In the Field Set** container: Financial Account Name (Name: Name), Type (Name: FinancialAccountType), Owner Type (Name: OwnerType), Date Opened (Name: OpenDate), and Balance (Name: Balance).

7. Save your changes.

- Repeat steps 1–7 to create these field sets with the same fields used in step 6:

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

Field Set Label	Name	Where is this used?

Checking Account	FSC_Client_CheckingAccount	Client profile's Financials tab
Credit Card Account	FSC_Client_CreditCard	Client profile's Financials tab
Savings Account	FSC_Client_SavingsAccount	Client profile's Financials tab
Loan Account	FSC_Client_LoanAccount	Client profile's Financials tab
Mortgage Account	FSC_Client_MortgageAccount	Client profile's Financials tab
HELOC Account	FSC_Client_HELOC	Client profile's Financials tab

- Repeat steps 1–7 to create these field sets:

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

With these fields:

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

Create Lead Field Sets for Retail Banking

Create custom field sets to include lead information on the global referral form and the client profile's Referrals tab.

1. From the object management settings for leads, go to Field Sets, and then click **New**.

2. Enter *LBL.Label_Field_Set_Referral_Form* as the **Field Set Label**.

3. Enter *FSC_Referral_Form* as the **Field Set Name**.

4. Enter *Used in global referral form* in the **Where is this used?** field.

5. Save your changes.

6. Drag these fields from the palette, and then drop them in the **In the Field Set** container: First Name (Name: FirstName), Last Name (Name: LastName), Expressed Interest (Name: ExpressedInterest), Company (Name: Company), Phone (Name: Phone), Email (Name: Email), Street (Name: Street), City (Name: City), State (Name: State), and Postal Code (Name: Postal Code).

7. Save your changes.

- Repeat steps 1–7 to create this field set:

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

With these fields:

Label	Name
Name	Name
Expressed Interest	ExpressedInterest
Created Date	CreatedDate

- Repeat steps 1–7 to create this field set:

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

With these fields:

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

Assign Page Layouts to New Financial Account Record Types

The Financial Accounts object includes new record types, such as Checking Account and Auto Loan, to support banking needs. These record types have customized page layouts that optimally display information for each account type.

Follow these steps to assign the custom pages to record types.

1. From Setup, open **Object Manager**.

2. Open the Object as indicated in the table below and then click **Record Types**.

3. Click **Page Layout Assignment** and then **Edit Assignment**.

4. For the record type indicated in the table, select the cell for the personal banker profile or the record type column, where assigning the layout to all profiles, and assign the page layout defined in the table.

5. Save your changes.

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

Update Lightning Page Layouts for the Banking Home Page and Retail Banking Console

Lightning pages designed to help personal bankers see their key data and tasks are included with Retail Banking. Follow these steps to set up these pages for various record types and the user's home page.

Assign Lightning Pages to Display Financial Services Cloud Data

You can assign different Lightning pages to the various Financial Services Cloud apps to display specific account record types. You can also choose which profiles can access the page. The two-column page layout is ideal for the Retail Banking app, the one-column layout is best suited to the Retail Banking Console, and the three-column suits both apps.

Assign the Banking Home Page Layout to a Profile

The Banking home page is tailored to the needs of personal bankers.

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.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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

Assign the Banking Home Page Layout to a Profile

The Banking home page is tailored to the needs of personal bankers.

Assign this home page to the Personal Banker profile by following these steps.

1. From Setup, enter `Lightning App Builder` in Quick Find, then select **Lightning App Builder**.

2. Click **View** for **Banking Home**.

3. Click **Activation**.

4. Select **Assign this Home page to specific profiles** and click **Next**.

5. Select **Personal Banker** from the list of profiles and click **Next**.

6. Activate your changes.

Add Personal Banker Users

Add Personal Banker users and assign them the Personal Banker profile and the related permission sets. Users must have these settings to access Financial Services Cloud.

1. From Setup, enter `Users` in Quick Find, then select **Users**.

2. Click **New User**. Enter the user's details and assign them the Salesforce user license and then the **Personal Banker** profile.

3. Save your changes.

4. Under Permission Set Assignments, click **Edit Assignments**.

5. Under Available Permission Sets, add the Financial Services Cloud Standard and Personal Banker Access permission sets to Enabled Permission Sets.

6. Save your changes.

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

Streamline Your Customer Onboarding Experience

Give your users access to a prebuilt sample app that streamlines the customer onboarding process. The sample app includes OmniScripts, Flows, Integration Procedures, DataRaptors, and other components that can be deployed to your Salesforce org and customized to meet your unique onboarding needs.

Before You Begin

Before setting up your Salesforce org for integrated onboarding and starting to work with the sample app for onboarding, review these considerations.

Set Up Integrated Onboarding for Financial Services Cloud

Give your users a head start in the onboarding journey. Turn on the Sample Onboarding Application template setting and set up your org to get started with onboarding applicants. The setup includes activating flows, creating products for applicants, deploying the sample OmniScripts, and more.

Work with the Sample App for Onboarding Applicants

After you set up Salesforce for integrated onboarding, launch the sample onboarding app and initiate the onboarding process.

Troubleshoot Issues During the Onboarding Process

When an error or exception occurs during the execution of a flow orchestration, the flow is transferred to the Exception Handling stage. A Process Exception record is created and the Flow Orchestration Instance Related Object stage is set to Fix Exceptions.

Before You Begin

Before setting up your Salesforce org for integrated onboarding and starting to work with the sample app for onboarding, review these considerations.

- The sample app is designed to give you a head start on building your own onboarding experience. It includes sample templates that you can customize to fit your needs. The sample templates work in a specific flow and depend on how you've set up your org to onboard applicants.

- Make sure to turn on Discovery Framework in your Salesforce org. See Enable Discovery Framework.

- Make sure to turn on Import or Export in your Salesforce org. See Configure Import or Export Settings.

- Make sure you turn on the Know Your Customer setting. See Enable Know Your Customer.

- OmniStudio Metadata setting is turned on.

- OmniStudio Managed Package Runtime setting is turned off.

- To get the most out of the sample app, it helps to have a good understanding of Discovery Framework, Integration Definitions, OmniScripts, Integration Procedures, Invocable Actions, Flows, Approval Processes, and Queues.

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

Set Up Integrated Onboarding for Financial Services Cloud

Give your users a head start in the onboarding journey. Turn on the Sample Onboarding Application template setting and set up your org to get started with onboarding applicants. The setup includes activating flows, creating products for applicants, deploying the sample OmniScripts, and more.

- To connect with external systems for identity verification and Anti Money Laundering (AML) screening, you can create integration definitions.

- To assess the risk of the applicant, set up expression sets that categorize each applicant based on their risk factors.

- To process the approval of Party Profile records, create approval processes that define the steps involved in approving or rejecting a Party Profile record.

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

Enable Integrated Onboarding

To enable the sample onboarding app in your Salesforce org, enable the Sample Onboarding Application template setting. By enabling this setting, you get access to the objects and flows necessary to onboard applicants.

Set Up Products to Onboard Applicants

Create products for which you want to onboard your applicants. For example, Savings Account and Checking Account.

Activate Flows to Onboard Applicants

The sample onboarding app template includes flows and flow orchestrations that help automate the onboarding process. When you enable the sample app in your Salesforce org, if the flows for onboarding aren't in the active state, clone and activate the new version before you begin to onboard applicants.

Deploy the prebuilt templates for onboarding that add sample OmniScripts, Integration Procedures, Data Raptors, and assessment questions to your Salesforce org. After you deploy, you can customize the sample templates to suit your business needs.

Add the sample FSC_Onboarding OmniScript to the Assessment record page layout, so that your users can launch the OmniScript from the Assessment record page. The sample OmniScript provides your users a guided experience through the onboarding process.

To connect Salesforce with an external system for AML screening and identity verification checks for applicants, create integration definitions. Then, call the integration definition from an invocable action within a flow or from an integration procedure in an OmniScript.

Use the Business Rules Engine to apply advanced logic and automate the decision-making process when onboarding an applicant.

To automate the review of Party Profile records that were created for onboarding applicants, create an approval process. Use approval processes to specify the sequence of steps that are necessary to approve a record.

Create a queue and specify the set of objects that are supported by the queue, and the set of users that are allowed to retrieve records from the queue.

Enable Integrated Onboarding

To enable the sample onboarding app in your Salesforce org, enable the Sample Onboarding Application template setting. By enabling this setting, you get access to the objects and flows necessary to onboard applicants.

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

2. Turn on **Sample Onboarding Application Template**.

EDITIONS

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

USER PERMISSIONS

To enable the sample onboarding application template:
- Financial Services Cloud Extension permission set

  AND

  Customize Application

Set Up Products to Onboard Applicants

Create products for which you want to onboard your applicants. For example, Savings Account and Checking Account.

1. From the App Launcher, find and select **Products**.

2. Click **New** and enter the product details.

3. To add another product, click **Save & New** or to finish, click **Save**.

Activate Flows to Onboard Applicants

The sample onboarding app template includes flows and flow orchestrations that help automate the onboarding process. When you enable the sample app in your Salesforce org, if the flows for onboarding aren't in the active state, clone and activate the new version before you begin to onboard applicants.

When you activate a flow version, the previously activated version (if one exists) is deactivated. Any running flow interview continues to run using the version that it started with.

1. Open the flow version in Flow Builder.

2. Click **Activate**.

Flows Provided to Onboard Applicants

The flows provided to onboard applicants are in the fsc_onboarding namespace. When you turn on the Sample Onboarding Application Template setting in your Salesforce org, the record-triggered flows aren't in the active state. To initiate the onboarding process, you must activate the flows.

Flows Provided to Onboard Applicants

The flows provided to onboard applicants are in the fsc_onboarding namespace. When you turn on the Sample Onboarding Application Template setting in your Salesforce org, the record-triggered flows aren't in the active state. To initiate the onboarding process, you must activate the flows.

This table lists the flows provided to onboard applicants.

Flow Label	Description	Default Status
Onboarding: Process an Application Form to Onboard a New Applicant	When the Flow Orchestration Instance Related Object record is created with Application Form as the reference object, this flow orchestration creates	Inactive

Flow Label	Description	Default Status
	an Applicant record, a Party Profile record, and an Assessment record. The flow orchestration then processes the Application Form to onboard a new applicant. The Flow Orchestration Instance Related object represents a junction between a flow orchestration instance and a related object for which the flow orchestration instance run was initiated.	
Onboarding: Process a Party Profile to Onboard a New Applicant	When the Flow Orchestration Instance Related Object record is created with the Reference Object as Party Profile, this flow orchestration processes the Party Profile record for identity verification, risk assessment, and screening checks.	Inactive
Onboarding: Resume Application	Resumes a paused onboarding application by updating the Flow Orchestration Instance ID in the Flow Orchestration Instance Related Obj.	Active
Onboarding: Initiate Application Form Onboarding	Allows the user to provide product information and specify whether additional applicants are needed for the application form. The flow then creates Party Profile, Application Form Product, and Assessment records to initiate the onboarding process.	Active
Onboarding: Create Assessments	Creates Assessment records for applicants whose Applicant stage isn't set to Approved.	Active
Onboarding: Set Orchestration Condition to Update Account and Opportunity Records	Checks if the stage of the Application Form record is either Approved or Rejected. If the stage is Approved or Rejected, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Check Application Form Stage and Update Account and Opportunity Records	Checks if the stage of the Application Form record is Completed. If it's Completed, the flow updates the Account record with the applicant's details and changes the stage of the Opportunity record to Closed Won.	Active
Onboarding: Resume Party Profile Onboarding	Resumes the paused party profile onboarding by updating the Flow Orchestration Instance ID in the Flow Orchestration Inst Related Object.	Active

Flow Label	Description	Default Status
Invoke the Industries Send External Async Request Action	Makes an asynchronous callout to an external endpoint to execute the callout request.	Active
Onboarding: Set Orchestration Conditions to Initiate Risk Assessment	Checks if the stage of the Party Profile record is Risk Screening and the stage of the Party Screening Summary record associated with the Party Profile record is Completed. If both conditions are met, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Assess the Risk Category for the Party Profile and Update the Party Profile Stage	Calls a Business Rules Engine action to assess the risk category of the Party Profile record that triggered the flow. The flow then creates a Party Profile Risk record and stores the risk category. Then the flow updates the stage of the Party Profile record to Approval. For more information on how to set up an expression set to determine the risk category, see Set Up Decision Matrices to Determine the Risk Category for a Party Profile on page 146.	Active
Onboarding: Request Party Profile Approval	Calls an action to submit the Party Profile record to the approval process that you've set up. For more information on how to set up the approval process for onboarding, see Set Up an Approval Process to Approve Party Profile Records on page 149.	Active
Onboarding: Set Orchestration Condition to Initiate Party Profile Approval	Checks if the Stage of the Party Profile record is Approved. If the stage is Approved, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Check Party Profile Status and Update Applicant Stage	Checks if the status of the party profile is Completed. If the status is Completed, the flow updates the stage of the associated Applicant record to Approved. Otherwise, the flow updates the stage of the Applicant record to Rejected.	Active
Onboarding: Resume Paused Application Form	Resumes the onboarding of an application form by creating a flow orchestration event	Inactive

Flow Label	Description	Default Status
	based on the record ID of the application form.	
Onboarding: Wake Up the Paused Flow Orchestration to Onboard a Party Profile	Creates a Flow Orchestration Event based on the Party Profile record ID to resume the onboarding process if it's paused.	Inactive
Onboarding: Process Flow Execution Errors	Creates a Process Exception record to process the flow execution errors and updates the status of the Flow Orchestration Instance Related Obj record to Fix Exceptions.	Active
Onboarding: Check the Document Checklist Item Status and Update Party Profile Stage	Checks whether the status of the Document Checklist Item for the Party Profile record is Accepted or not and updates the stage of the Party Profile record accordingly.	Inactive
Onboarding: Check Applicant Stage and Update Application Form Stage	Checks whether all the Applicant records for an application form are Approved or Rejected. If the Applicant records are approved, the flow updates the stage of the associated Application Form record to Approved. Otherwise, the flow updates the stage of the Application Form record to Rejected.	Inactive
Onboarding: Set Orchestration Condition to Initiate Identity Verification	Checks whether the stage of the Party Profile record is Risk Screening and the stage of the Party Identity Verification record associated with the Party Profile record is Completed. If both conditions are met, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Retry Party Profile Identity Verification and Screening Checks	Checks the status of the identity verification and screening checks for the Party Profile record. If they aren't complete, the flow allows the user to retry the identity verification and screening checks.	Active
Onboarding: Create Application Form from Lead	Creates an Application Form record from the Lead record and a Flow Orchestration Instance Related Object record to initiate the onboarding flow orchestration.	Inactive
Onboarding: Set Orchestration Condition to Initiate Screening Checks	Checks whether the stage of the Party Profile record is Risk Screening and the stage of the Party Screening Summary record associated with the Party Profile record is	Active

Flow Label	Description	Default Status
	Completed. If both conditions are met, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	
Onboarding: Set Conditions to Determine if the Perform Party Profile Identity Verification Stage is Completed	Checks whether the stage of the Party Profile record is Risk Screening and the stage of the Party Identity Verification record associated with the Party Profile record isn't Initiated. If both conditions are met, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Set Conditions to Determine if the Perform Party Profile Screening Checks Stage is Completed	Checks whether the stage of the Party Profile record is Risk Screening and the stage of the Party Screening Summary record associated with the Party Profile record is Completed. If both conditions are met, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Set Orchestration Condition to Resume an Orchestration Run	Checks whether the status of the Flow Orchestration Instance Related Obj record is Restarted or Fixed With Errors. If the status is Restarted or Fixed With Errors, the flow sets the orchestration condition to met. Otherwise, the flow sets the orchestration condition to not met.	Active
Onboarding: Set Orchestration Conditions to Restart or Resume Flow Orchestration Instance	Checks the status of the Flow Orchestration Instance Related Obj record and determines whether to restart or resume the orchestration instance run.	Inactive
Onboarding: Resume Flow Orchestration Instances that are in the Fix Exceptions Status	Retrieves the status of the Flow Orchestration Instance Related Obj record and stores it in an output variable. If the status is Restarted, updates the status of the Flow Orchestration Inst Related Obj record to In Progress.	Active

Deploy the Sample Templates to Onboard Applicants

Deploy the prebuilt templates for onboarding that add sample OmniScripts, Integration Procedures, Data Raptors, and assessment questions to your Salesforce org. After you deploy, you can customize the sample templates to suit your business needs.

Before you begin:

- Turn on Discovery Framework in your Salesforce org. See Enable Discovery Framework.

- Turn on Import or Export in your Salesforce org. See Configure Import or Export Settings.

- Turn on Sample Onboarding Application Template in your Salesforce org. See Enable Integrated Onboarding.

1. From Setup, in the Quick Find box, enter *Discovery Framework*, and then, under Discovery Framework select **General Settings**.

2. Turn on **Sample Templates**.

3. To deploy the template, from Setup, in the Quick Find box, enter *Discovery Framework Sample Templates*, and then select **Discovery Framework Sample Templates**.

   a. To see a list of the assessment questions, OmniScripts, DataRaptors, and Integration Procedures that are included in the onboarding template, for FSC_ONB v1, click **View Details**.

   b. For FSC_ONB v1, click **Deploy**.

4. To view the deployment status, from Setup, in the Quick Find box, enter *Deployment Status*, and then select **Deployment Status**.

After you deploy the sample template, clone and activate the OmniScript in the template. From the App Launcher, find and select OmniStudio. In the OmniStudio app, from the navigation bar, select OmniScripts. It can take a little time for the OmniScripts app to show. Select **FSC_Onboarding** and click **Create New Version**. Finally, click **Activate Version**.

Add the Sample OmniScript to the Assessment Record Page Layout

Add the sample FSC_Onboarding OmniScript to the Assessment record page layout, so that your users can launch the OmniScript from the Assessment record page. The sample OmniScript provides your users a guided experience through the onboarding process.

Before you begin:

- Go to Setup and then under OmniStudio Settings turn off Managed Package Runtime.

- If the sample FSC_Onboarding OmniScript is deactivated, activate the OmniScript. See Activate and Deploy OmniScripts.

From the Lightning App Builder, add the standard OmniScript component to a Lightning record page. You can add multiple OmniScript components to a record page.

1. On an Assessment record page, from the Setup menu, click **Edit Page.**

2. From the Tabs component properties, click **Add Tab**.

3. Customize a tab by clicking it in the properties pane.

   You can select a different standard label, or click **Custom** and enter a tab name. For example, *Assessments*.

4. To add an OmniScript component to a tab, go to the canvas, select the tab, and then drag the OmniScript component from the Standard section to the space directly below the tab.

When you add the OmniScript component, the first active OmniScript is added to the page. The component shows up on the canvas as a placeholder, and the Type and Subtype fields are filled from the first active OmniScript.

5. For Type. select **FSC**.

6. For SubType, select **Onboarding**.

7. If you added more than one OmniScript component to the tab, to modify the component's visibility by adding filters, set **Component Visibility**.

   For example, if you created multiple assessments for multiple products, you can add an OmniScript component for each assessment and make them visible on the Assessments tab based on the Assessment Type field value. When you define one or more filters and set the filter logic for a component, the component is hidden until the filter logic criteria are met. For more information on how to map an Application Form to an Assessment Type, see Set Up Decision Matrices to Map an Application Form to an Assessment Type on page 145.

8. Save your changes.

Set Up Integrations to Run Identity Verification and Anti-Money Laundering (AML) Screening for Applicants

To connect Salesforce with an external system for AML screening and identity verification checks for applicants, create integration definitions. Then, call the integration definition from an invocable action within a flow or from an integration procedure in an OmniScript.

To run identity verification and AML screening of applicants using the sample FSC_OnboardingOmniScript, create integration definitions and call them from either an Integration Procedure action in the OmniScript or from the Invoke the Industries Send External Async Request Action flow.

The specific integration definitions that you must create depend on the specific external systems that you're integrating with for running the verification and screening checks. Learn more about integration definitions in Create an Integration Definition.

1. If you created integration definitions to run identity verification and AML screening in an external system, modify the sample FSC_Onboarding OmniScript to add Integration Procedure actions that call these integration definitions.

   a. Open the OmniScript in OmniStudio Designer.

   b. From the OmniStudio Designer Build panel, under Actions, drag an Integration Procedure action onto the canvas.

      Drag the action onto the canvas after the Request Services step.

   c. In OmniScript, click **Integration Procedure Action** to open the Properties panel.

   d. In the Properties panel, in the Integration Procedure field, find and select the integration definition that you created for identity verification.

   e. Repeat the steps to add another integration procedure for AML screening of applicants.

2. To check the status of the identity verification and AML screening and to show the responses during the onboarding process, call the definitions from a flow.

   You must create two additional integration definitions to check the status of the identity verification and AML screening checks in the third-party system, respectively.

   a. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

   b. From the list of flows, click **Onboarding: Process a Party Profile to Onboard a New Applicant**.

EDITIONS

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

USER PERMISSIONS

To create integration definitions:
- IndustriesIntegrationFwk

To create or update an OmniScript:
- OmniStudio Admin permissions set

c. Edit the Initiate Identity Verification step resource and reference the integration definition that you created to check the status of the identity verification process.

d. Edit the Initiate Screening Checks step resource and reference the integration definition that you created to check the status of the screening checks.

e. Save your changes and activate the OmniScript.

Set Up Decision Matrices and Build an Expression Set

Use the Business Rules Engine to apply advanced logic and automate the decision-making process when onboarding an applicant.

Decision matrices and expression sets are key components in the Business Rules Engine. Decision matrices are lookup tables that contain user-defined input and output columns. The engine takes in inputs and then looks up the appropriate outputs. When an expression set calls a decision matrix, the engine locates the table row that matches the input values and returns the output value for that row.

When you enable the Sample Onboarding Application Template setting, you can access two prebuilt expression set templates. These templates are designed to automate decision-making processes when onboarding an applicant using the sample onboarding app.

- Application Assessment Mapping: This template maps an application form to an assessment based on the value of the application form product.

- Evaluate Party Profile Risk: This template determines the risk category for a party profile record based on the values of the Employment Industry, Employment Type, and Fund Source fields.

Set Up Decision Matrices to Map an Application Form to an Assessment Type

Set up a Decision matrix and then build an expression set to automate the process of mapping an Application Form to an Assessment Type based on the Application Form Product selected by the applicant.

Set Up Decision Matrices to Determine the Risk Category for a Party Profile

Set up a Decision Matrix and then build an expression set to automate the calculation of a risk category for a Party Profile record.

Set Up Decision Matrices to Map an Application Form to an Assessment Type

Set up a Decision matrix and then build an expression set to automate the process of mapping an Application Form to an Assessment Type based on the Application Form Product selected by the applicant.

Mapping of assessment type to application form can be useful if you created multiple assessments for multiple products. Add an OmniScript component for each assessment and make them visible on the Assessments tab based on the assessment type field value.

1. From the App Launcher, find and select **Business Rules Engine**.

2. From the app navigation menu, select **Lookup Tables**.

3. Click **New**.

4. Select **Decision Matrix** and click **Next**.

5. For Name, enter `Application Assessment Map`, and for Type, select **Standard**.

6. Save your work.

7. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

8. Add columns to define your input and output data.

   The input data includes the product that you set up and the output data is the assessment type for each product. Here's a sample decision matrix for mapping an application form to an assessment type:

Input Data	Output Data
ApplicationType (Text)	**AssessmentType (Text)**
Checkings Account	Checkings Account
Savings Account	Savings Account

9. Save and activate your decision matrix.

After you create the decision matrix, reference it from the Application Assessment Mapping expression set template. The flow with the label, Onboarding: Create Assessments, calls this expression set during the onboarding process to determine which assessment to attach to the applicant.

USER PERMISSIONS

To create, update, and delete expression sets:
- Rule Engine Designer

To use decision tables in Business Rules Engine:
- Rules Engine Runtime

Set Up Decision Matrices to Determine the Risk Category for a Party Profile

Set up a Decision Matrix and then build an expression set to automate the calculation of a risk category for a Party Profile record.

1. To determine the risk category for a party profile based on employment industry, create a decision matrix.

   a. From the App Launcher, find and select **Business Rules Engine**.

   b. From the app navigation menu, select **Lookup Tables**.

   c. Click **New**.

   d. Select **Decision Matrix** and click **Next**.

   e. For Name, enter *EmploymentIndustryRisk*, and for Type, select **Standard**.

   f. Save your work.

   g. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

   h. Add columns to define your input and output data.

      Here's a sample decision matrix for mapping an application form to an assessment type:

Input Data	Output Data
EmploymentIndustry (Text)	**EmploymentIndustryRisk (Number)**
Banking	1
Energy and Utilities	2
Government	1
Healthcare	2
IT	1
Mining	10
Real Estate	2

   i. Save and activate your decision table.

2. To determine the risk category for a party profile based on employment type, create another decision matrix:

   a. From the App Launcher, find and select **Business Rules Engine**.

   b. From the app navigation menu, select **Lookup Tables**.

   c. Click **New**.

   d. Select **Decision Matrix** and click **Next**.

   e. For Name, enter *EmploymentTypeRisk*, and for Type, select **Standard**.

   f. Save your work.

   g. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

   h. Add columns to define your input and output data.

Here's a sample decision matrix for mapping an application form to an assessment type:

Input Data	Output Data
EmploymentIndustry (Text)	**EmploymentIndustryRisk (Number)**
Full Time	1
Independent Contractor	5
Part-Time	7
Retired	6
Student	9
Temporary	9
Unemployed	10

    i. Save and activate your decision table.

3. To determine the risk category for a party profile based on source of funds, create another decision matrix.

    a. From the App Launcher, find and select **Business Rules Engine**.

    b. From the app navigation menu, select **Lookup Tables**.

    c. Click **New**.

    d. Select **Decision Matrix** and click **Next**.

    e. For Name, enter *FundSourceRisk*, and for Type, select **Standard**.

    f. Save your work.

    g. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

    h. Add columns to define your input and output data.

    Here's a sample decision matrix for mapping an application form to an assessment type:

Input Data	Output Data
FundSource (Text)	**FundSourceRisk (Number)**
Business Income	5
Commission	4
Government Benefits	10
Rental Income	3
Salary	1

    i. Save and activate your decision table.

4. To determine the overall risk category for a party profile based on employment industry, employment type, and source of funds, create another decision matrix.

You can also associate the risk category with the date of the next party profile review in the same decision matrix.

a. From the App Launcher, find and select **Business Rules Engine**.

b. From the app navigation menu, select **Lookup Tables**.

c. Click **New**.

d. Select **Decision Matrix** and click **Next**.

e. For Name, enter `OverallRiskWithReviewPeriod`, and for Type, select **Standard**.

f. Save your work.

g. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

h. Add columns to define your input and output data.

Here's a sample decision matrix for mapping an application form to an assessment type:

Input Data	Output Data	
OverallRisk (Number Range)	**OverallRiskValue (Text)**	**KYCReviewPeriod (Number)**
0	Low	36
3	Medium	12
5	High	6

i. Save and activate your decision table.

After you create the decision matrix, reference it from the Evaluate Party Profile Risk expression set template. In the sample expressions set template, update the formula in the Calculation step to suit your business needs. The flow with the label, Onboarding: Assess the Risk Category for the Party Profile and Update the Party Profile Stage, calls this expression set during the onboarding process to determine the risk category of the party profile.

Set Up an Approval Process to Approve Party Profile Records

To automate the review of Party Profile records that were created for onboarding applicants, create an approval process. Use approval processes to specify the sequence of steps that are necessary to approve a record.

A Party Profile record represents the information about the profile of the applicant that you're onboarding. An approval process for Party Profile specifies each step of approval, including from whom to request approval and what to do at each point of the process.

1. From Setup, in the Quick Find box, find and select **Approval Processes**.

2. For Manage Approval Processes For, select **Party Profile.**

3. Click **Create New Approval Process** and then select **Use Standard Setup Wizard**.

4. Enter `Approve Party Profile`as the name for the approval process.

   If you enter a different name, make sure to update the references to the approval process in the flow Onboarding: Request Party Profile Approval.

5. If only certain types of records should enter this approval process, enter that criteria and click **Next**.

6. Select the field to use for automated approval routing.

7. Under Record Editability Properties, select **Administrators ONLY can edit records during the approval process**.

8. Click **Next**.

9. If you created an email template, select the email template that's used to notify approvers that an approval request has been assigned to them.

10. Select the fields to show on the Approval page layout.

    a. From the Available Fields list, add the fields from the Party Profile object to the Selected Field.

       For example, you can select Party Profile Name, Owner Name, Created Date as the fields to show on the Approval page layout.

    b. Select **Display approval history information in addition to the fields selected above**.

    c. Under Security Settings, select **Allow approvers to access the approval page only from within the Salesforce application. (Recommended)**.

11. Specify which users are allowed to submit the initial request for approval.

    For example, you can select Party Profile Owner as the Allowed Submitter.

12. Save your changes.

Add an Approval Step to the Approval Process

Add an approval step to determine the records that can advance to that step and the approver, and whether to let an approver's delegate respond to the requests.

Add Field Updates to the Approval Process

Field updates change the selected field after the approval process is complete. You can add field updates for Final Approval Actions and Final Rejection Actions.

Activate the Approval Process to Approve Party Profile Records

After setting up the approval process, always activate the approval process.

Add an Approval Step to the Approval Process

Add an approval step to determine the records that can advance to that step and the approver, and whether to let an approver's delegate respond to the requests.

1. From Setup, in the Quick Find box, enter `Approval Processes`, and then click **Approval Processes**.

2. Select the approval process to which you want to add the approval step.

3. Under Approval Steps, click **New Approval Step**.

4. Enter a name for the approval step, and then click **Next**.

5. Select **All records should enter this step**, and then click **Next**.

6. Select **Automatically assign to queue,** and then select a queue.

7. Save your changes.

Add Field Updates to the Approval Process

Field updates change the selected field after the approval process is complete. You can add field updates for Final Approval Actions and Final Rejection Actions.

1. To add a field update for the Final Approval action,

   a. Under the Final Approval Actions, click **Add New**, and then select **Field Update**.

   b. Enter a name for the field update.

   For example, `Party Profile to Reviewed`.

   c. From the Field to Update dropdown list, select **Stage**.

   d. Under Specify New Field Value, select **A specific value** and select **Approved**.

   e. Save your changes.

2. To add a field update for the Final Rejection action,

   a. Under the Final Rejection Actions, click **Add New**, and then select **Field Update**.

   b. Enter a name for the field update.

   For example, `Party Profile to Rejected`.

   c. From the Field to Update dropdown list, select **Stage**.

   d. Under Specify New Field Value, select **A specific value** and select **Rejected**.

   e. Save your changes.

Activate the Approval Process to Approve Party Profile Records

After setting up the approval process, always activate the approval process.

1. Open the approval process.

2. Make sure that it's configured correctly.

3. Click **Activate**.

Create and Configure a Queue

Create a queue and specify the set of objects that are supported by the queue, and the set of users that are allowed to retrieve records from the queue.

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they're transferred to another queue.

1. From Setup, in the Quick Find box, enter `Queues`, and then click **Queues**.

2. Click **New**.

3. Enter a label for the queue.

   For example, `Onboarding Queue`.

4. Add an email for the queue, if necessary.

5. Select **Send Emails to Members**, if necessary.

6. Under Supported Objects, from the Available Objects list, select the objects.

   For example, for an onboarding queue, you can select Applicant, Application Form, and Party Profile.

7. To move the shift object to the Selected Objects list, click **Add**.

8. Under Queue Members, from the Available Members list, select the user roles to whom you want to assign the queue.

9. To move the selected members to the Selected Members list, click **Add**.

   For example, select User: Agents to notify mid-office agents of the rejected or approved application forms.

10. Save your changes.

Assign the Interactive Steps in the Flows for Onboarding to a Queue

When the active screen flow associated with the interactive step runs, a record is assigned to the queue.

Assign the Interactive Steps in the Flows for Onboarding to a Queue

When the active screen flow associated with the interactive step runs, a record is assigned to the queue.

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

2. From the list of flows, click the flow that has interactive steps.

3. For an interactive step, under Select Someone to Complete the Action, select the assignment type as **Queue**.

4. Under Queue, select the queue you set up for the onboarding process.

Work with the Sample App for Onboarding Applicants

After you set up Salesforce for integrated onboarding, launch the sample onboarding app and initiate the onboarding process.

When a lead is converted to an opportunity, the sample app starts the onboarding process. A record-triggered flow creates an application form record from the lead record and a flow orchestration instance related obj record. The flow orchestration instance related obj record stores information about the flow orchestration that's running. When the application form record is created, your users can use the Flow Orchestration Work Guide component on the application form record page to complete the screen flow that's assigned to them.

Initiate the Onboarding Process

To initiate the onboarding process for applicants, launch the sample Onboarding app, create a lead record for an applicant, and then convert the lead to an opportunity.

Add Product Details to the Application Form

Use the Flow Orchestration Work Guide component on the application form record page to select a product for the applicant. By using the Work Guide component, you can add applicants, if necessary.

Provide Applicant Details

To provide applicant details for Know Your Customer (KYC) verification, complete the assessment form that's created for each applicant. The assessment form collects information such as primary information, address details, employment details, the services that the applicants are requesting, and more.

Validate Identity Verification and Risk Screening Status

The Work Guide component on the applicant's party profile record page shows the status of the identity verification and AML screening.

Validate Documents in Document Checklist Items

Validate a document in a Document Checklist Item against data from the party profile and its child records. You can validate against multiple object records at a time.

Validate the Risk Assessment Status

When an applicant's KYC documents are approved, the Party Profile record's stage is updated to Risk Assessment.

Review the Application Form Status

When the stage of the party profile record is Completed, the applicant record that's associated with the party profile record is set to Approved. When all the applicant records are approved, the application form record that's associated with the applicant records is set to Approved.

Initiate the Onboarding Process

USER PERMISSIONS		EDITIONS
To initiate onboarding:	Financial Services Cloud Extension permission	Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions that have the Financial Services Cloud enabled
To convert a lead:	Create and Edit on Leads, Accounts, Contacts AND Convert Leads	
To relate the converted lead to a new opportunity:	Create on Opportunities	
To relate the converted lead to a new opportunity:	Create on Opportunities	
To relate the converted lead to an existing opportunity:	Edit on Opportunities	
To avoid creating duplicate records when converting leads:	Require Validation for Converted Leads	

To initiate the onboarding process for applicants, launch the sample Onboarding app, create a lead record for an applicant, and then convert the lead to an opportunity.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Leads** tab.

3. Open the lead record and click **Convert**.

4. In the Account section, create an account for the lead.

   If you're converting a lead who works for an existing account, select the existing account.

5. In the Opportunity section, enter a name for the new opportunity.

   If you're converting a lead to an existing opportunity, select the existing opportunity.

6. Check that the Record Owner and Converted Status are correct.

7. Click **Convert**.

When you convert a lead to an opportunity, the app creates an application form record with the information of the lead record. The application form stores the information of an application submitted for the product.

Add Product Details to the Application Form

Use the Flow Orchestration Work Guide component on the application form record page to select a product for the applicant. By using the Work Guide component, you can add applicants, if necessary.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Opportunities** tab.

3. Click the opportunity record that was created when you converted the lead to an opportunity.

4. From the **Related** component, click the application form record that's related to the opportunity.

5. On the Work Guide component, search for and select the product.

6. Review the applicant details and click **Next**.

7. To add applicants to the application form, select **Add Additional Applicants** and click **Next**.

    a. Provide applicant details.

    b. If the applicant is an existing customer, select **Yes**, and then select the account that's related to the customer and click **Next**.

    c. If the applicant isn't an existing customer, select **No** and click **Next**.

       Provide details for the additional applicant.

8. Click **Finish**.

When you click Finish, the app calls a flow that creates three records, an applicant record, an assessment record, and a Party Profile record. The flow creates a party profile record for the applicant if there's no existing active party profile record.

The applicant record stores information about the individual or group being onboarded. The party profile record stores information about the profile of a party and is used for identity verification and risk assessment purposes. The assessment record stores the applicant assessment information .

Provide Applicant Details

To provide applicant details for Know Your Customer (KYC) verification, complete the assessment form that's created for each applicant. The assessment form collects information such as primary information, address details, employment details, the services that the applicants are requesting, and more.

If your admin created integration definitions and set up Salesforce for Identity Verification and Anti-Money Laundering (AML) screening of applicants, the onboarding flows call the integration definitions at this stage to start the verification process and screening checks.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Application Forms** tab.

3. From the Assessments related list, click the assessment record for which you want to submit the responses.

4. Click the **Assessment Form** tab.

5. Follow the instructions in the guided experience and provide your responses.

6. To initiate identity verification, in the Identity Verification step, scan the QR code from your mobile, or click the link in the step.

7. After the identity verification is complete, click **Next**. The results of this step depend on how your adming set up the integration definitions for identity verification.

8. Review the Disclosure and Consent statement and add your digital signature.

9. Upload documents for validation.

   The documents are saved as Document Checklist Items and attached to the assessment record. If your admin added the Discovery Framework Document Matrix element to an assessment form, the element dynamically generates a list of documents that respondents must upload. For more information, see Dynamically Identify the Documents to Upload for an Assessment.

10. Review the confirmation message.

After you submit the assessment form, the app updates the status of the applicant's party profile record to Risk Screening. The app also creates a party identity verification record and party screening summary record. The party identity verification record stores information about the identity verification checks done for the applicant. The party screening summary record stores information about the screening checks that were done for the applicant.

Validate Identity Verification and Risk Screening Status

The Work Guide component on the applicant's party profile record page shows the status of the identity verification and AML screening.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Application Forms** tab.

3. From the Applicants section, click the applicant record for whom you want to perform the risk screening.

4. In the Details section, under Party Profile, click the Party Profile record related to the applicant.

5. In the Work Guide component, review the status of the identity verification checks and AML screening for the applicant, and click **Finish**.

If the status on the Work Guide component is Completed, the app calls a flow that updates the stage of the applicant's party profile record to Document Validation. If the status isn't completed or is rejected, the app allows the user to retry the identity verification selects and AML screening for the applicant. To review the documents that were uploaded for KYC verification, from the Party Profile record page, go to the Documents tab. Then, use Validate Document to review and validate the documents.

Validate Documents in Document Checklist Items

Validate a document in a Document Checklist Item against data from the party profile and its child records. You can validate against multiple object records at a time.

Before you begin:

- Enable the Discovery Framework feature in Salesforce. See Enable Discovery Framework.
- Enable the Know Your Customer setting. See Enable Know Your Customer.
- Assign the Document Checklist permission set to give your users access to document checklist items. See Assign the Document Checklist Permission Set

Use the Validate Document feature to streamline the end-to-end document approval lifecycle. For example, you can validate that the data in the documents that a respondent uploads after taking an assessment are consistent with the information in their party profile record and any other related records. After you validated the document, update the status of the document to either Approved or Rejected. You can also add validation comments.

1. From the App Launcher, find and select **Document Checklist Items**.

2. From the Document Checklist Items list view, click the Document Checklist Item record that was created for the document that the respondent uploaded when taking the assessment.

3. From the quick actions menu, click **Validate Document**.

   You can see a preview of the document that was uploaded and you can select the object and object record that you want to validate the document information against.

   > 📝 Note: Previewing password-protected files isn't supported.

4. From the Object list, select an object.

   You can select only the Party Profile object or any of its child objects.

5. For the selected object, select an object record.

6. Compare the information in the document to the information in the object record.

7. To validate the document against multiple object and object records, compare the information in the document to the information in one object record, then select a different object and object record and compare the document to that record.

8. Click **Next**.

9. Review the summary of object records that were validated against the document in the Document Checklist Item.

10. From the Status list, select the status that you want to assign to the document that you validated.

11. Add any validation comments, if necessary.

12. Save your changes.

After you've validated the document, you can view a list of the objects that were validated, the approval history, and more. To view, on the Document Checklist Item record page, click the **Related** tab. The Document Checklist Item Validated Targets and Approval History related lists show the details.

SEE ALSO:

Dynamically Identify the Documents to Upload for an Assessment

Validate the Risk Assessment Status

When an applicant's KYC documents are approved, the Party Profile record's stage is updated to Risk Assessment.

If you set up an expression set to determine the risk category and configured the Onboarding: Assess the Risk Category for the Party Profile and Update the Party Profile Stage flow with that expression set, the flow is invoked when the stage of the party profile record is updated to Risk Assessment. The flow also creates a Party Profile Risk record and stores the risk category.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Application Forms** tab.

3. From the Applicants section, click the applicant record for whom you want to perform the risk assessment.

4. In the Details section, under Party Profile, click the party profile record that's related to the applicant.

5. Review the status and click **Finish**.

Review the Application Form Status

When the stage of the party profile record is Completed, the applicant record that's associated with the party profile record is set to Approved. When all the applicant records are approved, the application form record that's associated with the applicant records is set to Approved.

The Onboarding: Check Party Profile Status and Update Applicant Stage flow, checks whether the status of the party profile is Completed. If the status is Completed, the flow updates the stage of the associated applicant record to Approved. Otherwise, the flow updates the stage of the applicant record to Rejected. Similarly, the Onboarding: Check Applicant Stage and Update Application Form Stage flow, checks whether all the applicant records for an application form are Approved or Rejected. If the applicant records are approved, the flow updates the stage of the associated application form record to Approved. Otherwise, the flow updates the stage of the application form record to Rejected. When the application form stage is set to Approved, the onboarding process is complete.

1. From the App Launcher, find and select **Onboarding**.

2. Click the **Application Forms** tab.

3. Review the Application Form stage.

Troubleshoot Issues During the Onboarding Process

When an error or exception occurs during the execution of a flow orchestration, the flow is transferred to the Exception Handling stage. A Process Exception record is created and the Flow Orchestration Instance Related Object stage is set to Fix Exceptions.

The Onboarding: Process Flow Execution Errors flow, creates a Process Exception record to process flow execution errors and updates the status of the Flow Orchestration Instance Related Obj record to Fix Exceptions. The flow orchestration waits for the admin to update the stage of the Flow Orchestration Instance Related Obj stage to either Restarted or Finished with Errors.

If the admin updates the stage to Restarted, the flow orchestration resumes the same instance of the orchestration from the stage where it failed. If the admin updates the stage to Finished With Errors, the flow orchestration ends.

When the stage of the Flow Orchestration Instance Related Object is updated from Finished With Errors to Restarted, the Onboarding: Set Orchestration Conditions to Restart or Resume Flow Orchestration Instance flow creates an instance of the flow orchestration to restart the onboarding process.

1. To troubleshoot a Flow Orchestration Troubleshoot Orchestrations.

   Onboarding: Process an Application Form to Onboard a New Applicant and Onboarding: Process a Party Profile to Onboard a New Applicant are the two flow orchestrations provided for onboarding applicants.

Set Up and Manage Wealth Management

Give your financial advisors a holistic view of customers with Wealth Management, a Financial Services Cloud Lightning app. Empower your advisors to deliver the personalized, proactive service that clients expect. Accelerate user productivity with technology that helps them engage with clients like never before, and build deeper, lasting, more profitable relationships.

Follow these steps to enable Wealth Management features.

Create a Financial Advisor Profile

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

Enable Financial Advisor Profile Permissions

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

Add Quick Actions in Client Segmentation App

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

Embed Client Segmentation App Dashboards in Financial Services Cloud

After you create and share the Client Segmentation App app, users can access its dashboards through Analytics Studio. To make the dashboards available in Financial Services Cloud, create a tab and embed the dashboards in the tab.

Synchronize the Next and Last Interactions on the Account Object

Schedule an Apex job to set up a batch job for next and last interaction calculations.

Specify Custom Record Types for Synchronization

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

Create a Financial Advisor Profile

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

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

2. Click **New**.

3. From the Existing Profile list, select **Standard User**.

4. Enter a profile name, such as `Financial Advisor`.

5. Save your changes.

Enable Financial Advisor Profile Permissions

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

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

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

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

3. Make these changes:

   - Under Custom App Settings:

     – Set Wealth Management as the default app.

   - Under Tab Settings -> Custom Tab Settings:

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

     – Education: Default Off

     – Employment: Default Off

     – Financial holdings: Default Off

     – Identification documents: Default Off

     – Securities: Default Off

   - Under Administrative Permissions:

     – Enable View Dashboards in Public Folders

     – Enable View Reports in Public Folders

   - Under General User Permissions:

     – Enable: Manage Leads

     – Enable: Report Builder

     – Enable: Transfer Leads

     – Enable: View My Team's Dashboards

4. Save your changes.

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

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

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

8. Under Record Type Settings, verify the following:

   - The Contacts record type defaults to Individuals.

   - The Events record type includes Advisor Event and defaults to Advisor Event.

   - The Leads record type includes Referral and defaults to Referral.

   - The Billing Statements record type includes Credit and Debit and defaults to Credit.

   - The Financial Accounts record type includes Auto Loan, Checking Account, Credit Card, HELOC, Loan Account, Mortgage, Savings Account, and General Account, and defaults to Checking Account.

   - The Opportunities record type defaults to General.

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

Add Quick Actions in Client Segmentation App

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

1. From Setup, open **Object Manager** and click **Account**.

2. Open **Page Layouts** and click **Account (Individual) Layout**.

3. Verify that you are updating the managed Account Contact Relationship layout.

   📝 Note: The managed Account Contact Relationship layout displays a message that the layout is managed.
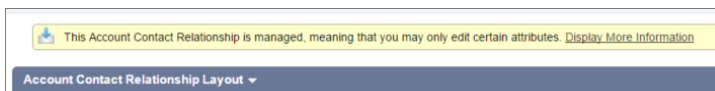
4. In the palette, select **Quick Actions**, and then drag each quick action to the Quick Actions in the Salesforce Classic Publisher section and the Salesforce Mobile and Lightning Experience Actions section.

5. Save your changes.

Embed Client Segmentation App Dashboards in Financial Services Cloud

After you create and share the Client Segmentation App app, users can access its dashboards through Analytics Studio. To make the dashboards available in Financial Services Cloud, create a tab and embed the dashboards in the tab.

1. Create a Visualforce page where you embed Client Segmentation dashboards.

2. Embed dashboards in your page.

3. Add your page to a Visualforce tab.

SEE ALSO:

Create Visualforce Pages

Add a Analytics Dashboard to a Visualforce Page

Create Visualforce Tabs

Synchronize the Next and Last Interactions on the Account Object

Schedule an Apex job to set up a batch job for next and last interaction calculations.

1. From **Setup** in the Quick Find box, enter `apex`, and then select **Apex Classes**.

2. Click **Schedule Apex**.

3. Enter a job name.

4. For Apex Class, look up and select **ContactInteractionSchedulable**.

5. Select the batch job.

6. Enter today's date as the start and end date.

7. Choose the start time. The batch job is scheduled to run every 15 minutes.

8. Save your changes.

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Enterprise** and **Unlimited** editions.

Specify Custom Record Types for Synchronization

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

1. From **Setup** in the Quick Find box, enter `Custom Metadata Types`, and then select **Custom Metadata Types**.

2. Click **Manage Records** next to InteractionFieldUpdate.

   > **Note:** By default, AdvisorEventRecordType and AdvisorTaskRecordType configurations are available. These records include AdvisorEvent and AdvisorTask record types for calculation in next and last interaction dates.

3. Click **New**.

4. Enter a label.

5. Specify the Object Name, such as Event.

6. Specify the Record Type Name, such as ClientAssociateEvent.

7. Save your changes.

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Common Capabilities in Financial Services Cloud

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

> **Note:** For information about Action Plans, Actionable Segmentation, Discovery Framework, Business Rule Engine, Record Alerts, Service Process Studio, Document Generation, OmniStudio, and other features that are available in Financial Services Cloud as well as other Salesforce Industries clouds, check out Extend Your Industries Cloud with Common Features.

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

Actionable Segmentation

Actionable Segmentation enables you to segment similar client profiles, curate them, and design timely and personalized client outreach programs. Actionable list definitions and actionable lists are the key elements of the Actionable Segmentation feature.

Action Launcher

By using the Action Launcher component, service agents can resolve customer queries more quickly and efficiently. They can use the Action Launcher component to search for and launch quick actions, OmniScripts, Screen flows, Field Service Mobile flows, and Autolaunched flows.

Action Plans

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

Actionable Relationship Center (ARC) in Financial Services Cloud

The Actionable Relationship Center (ARC) lets you view your customers' relationships in an easy-to-navigate graph. ARC helps you understand relationships among people and businesses by presenting them in interactive components. Build graphs with standard and custom objects, then add the ARC Relationship Graph component to page layouts to show your graphs. Customize node names, show fields, and object and record actions so that your users can easily view, edit, delete, and create records during customer interactions.

Ensure Privacy of Customers With Audit Trail

Audit Trail lets service agents inspect customer identity verification logs, detect potential cases of identity fraud, and meet audit compliance standards. Audit Trail works with customer identity verification records, which are created when the CSRs use the Verify Customer Identity flow to verify the customer's identity.

Branch Management

Track branch performance and productivity with Branch Management.

Business Rules Engine

Simplify the process of determining eligibility or qualification and automate complex decision-making to find solutions faster using Business Rules Engine.

Caller Identity Verification

Verify the identity of a caller before you share any sensitive information with them. Organizations across the world are required to comply with regulations that help to ascertain the customer's identity and provide protection from losses and fraud. Failure to follow these regulations has legal consequences. Organizations must ensure that any person who seeks confidential information must first prove their identity and access.

Complaint Management

Complaint Management provides a streamlined process for service agents to capture and submit client complaints directly from a Person Account record. Case agents can also track and monitor submitted complaints. If you enable CRM Analytics and create a CRM App for Complaint Management, your customer experience managers can use the prebuilt dashboards to gain insights on complaints. You can also set up a self-service portal for your customer community users to let them directly file complaints on the portal.

Compliant Data Sharing for Financial Services

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

Data Consumption Framework

With Data Consumption Framework, your agents can access complete and current data from external systems without leaving Salesforce. The framework extends the Continuations framework in FlexCards and OmniScripts by providing them with integration definition capabilities for better real-time performance. In addition, agents can use the framework to initiate asynchronous flows that call APIs at scale to support more simultaneous users.

Discovery Framework

With the Discovery Framework, your users can create digital forms to collect and validate data and avoid time-consuming and error-prone manual methods. The Discovery Framework data model and the power of OmniStudio enable your users to create digital forms and manage every aspect of questionnaire-driven data collection in compliance with your policies.

Document Generation

With Document Generation, you can generate contracts, proposals, quotes, reports, non-disclosure agreements, service agreements, and more.

Document Checklist Items in Financial Services Cloud

Manage your document approval process in Financial Services Cloud. Define document types for commonly required documentation. Then create a document checklist item for each file required from a customer. A customer or user then uploads a relevant file for the document checklist item, and the files are tracked through your approval process. Customers can track the progress of their uploaded documentation from submission to approval.

Engagement

Use the engagement data model to store details about an engagement between a customer and a service agent.

Events and Milestones

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

Provide a Comprehensive View of Customer Financial Account Details

Using the FSCFinancialAccountsSummary component, service agents can view financial accounts, transactions, and record alerts associated with accounts in one place. The financial account details show information stored in Salesforce. The comprehensive view of financial account details helps agents to resolve customer queries quickly and efficiently.

Financial Deal Management

Track and manage a financial deal lifecycle. By using the Financial Deal Management data model, deal teams can manage every aspect of deal-related information and take advantage of compliant, role-based data sharing options. They can create new financial deal records that specify a deal's stage, status, probability of deal success, and more. And to maintain compliance, they can share deal records that contain confidential information only with relevant stakeholders.

Financial Plans and Goals

Help your clients plan for and reach their short and long-term financial objectives using the Financial Goals and Financial Plans objects. These objects are available with your Financial Services Cloud license. Financial plans and goals use OmniStudio for added customization.

Groups (Householding)

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

Intelligent Document Automation for Consent and Disclosures

Manage consent and disclosure documents, generate authorization request forms, and track user responses by using Intelligent Document Automation features.

Intelligent Need-Based Referrals and Scoring

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.

Interaction Summaries

Capture and share interaction summaries.

Interest Tags

Let your users add custom Interest Tags to client records to capture client needs, interests, and prospecting opportunities. Having clients' interests in mind during client interactions helps deepen relationships. Organize interest tags into tag categories, which group similar interest tags so that you can easily create reports and dashboards showing common themes and interests across clients.

Know Your Customers

By using the Know Your Customer (KYC) data model, your users can perform identity verification, risk assessment, and screening checks of parties with ease. Parties can be accounts, contacts, or leads.

OmniStudio for Financial Services Cloud

OmniStudio is a managed package of application components built on the Salesforce platform that you can download and install into Financial Services Cloud. Configure users to give your agents the ability to access the remote site and enable admins to customize appointment flows.

Record Alerts

Alert your agents to changes in client records that require action. Using Record Alerts, agents can scan records for notifications that show information from your core banking system or from alerts that are stored in Salesforce.

Record Association Builder

Define criteria for linking new or changed records with the branches that work with them.

Rollups

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

Service Process Automation

Service Process Automation helps you streamline and automate service-related operations. The core component of Service Process Automation is Service Process Studio, a framework that lets you design case-driven service processes, starting from request intake to fulfillment. Each service process includes an OmniScript for request intake through assisted and self-service channels and it features flows for streamlined fulfillment.

Tear Sheet Generation

Summarize information from objects in a tear sheet. By using the Summary Document component, your users can quickly generate a tear sheet that summarizes the information they need from one or more objects. To quickly access the document, your users can attach the document to an Account, Contact, or Financial Deal record page layout where the component is added.

Timeline in Financial Services Cloud

Timeline provides a comprehensive and chronological view of customer interactions, showing key events relating to a person or a resource in one place.

Actionable Segmentation

Actionable Segmentation enables you to segment similar client profiles, curate them, and design timely and personalized client outreach programs. Actionable list definitions and actionable lists are the key elements of the Actionable Segmentation feature.

You can create actionable lists for various outreach initiatives. For example, as a wealth manager, create an actionable list of high net worth individuals for a wealth plan outreach initiative, or an actionable list of potential leads for an Insurance Plan initiative.

Create actionable list definitions that enable you to build datasets containing records joining information across multiple objects according to your business requirements. For example, if a business requirement is to sell a wealth plan designed for high net worth individuals or households whose net worth is greater than US$1 million, then your org admin can create a dataset containing such records by performing cross-object joins of Account, Contact, Financial Account, and other related objects.

Create an actionable list by using an actionable list definition. You can specify list filtering criteria when creating a list. Before creating a list, ensure that your org admin has already created and activated the actionable list definition that you plan to use.

SEE ALSO:

Salesforce Help: Actionable Segmentation

<div style="float:right">

EDITIONS

Available in: Lightning Experience

Available in: Clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses

</div>

Action Launcher

By using the Action Launcher component, service agents can resolve customer queries more quickly and efficiently. They can use the Action Launcher component to search for and launch quick actions, OmniScripts, Screen flows, Field Service Mobile flows, and Autolaunched flows.

Action Launcher is available in Lightning Experience.

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

For example, let's consider a customer service call in a retail banking scenario. The customer calls a service agent and places an order for a checkbook. To resolve this query quickly, the agent can launch the relevant quick action, OmniScript, or flow, from the Action Launcher component and create a request for a new checkbook. To enable an agent to search for and launch an action from the Action Launcher component, ensure that the relevant quick actions, OmniScripts, or flows are configured in the corresponding Action Launcher deployment.

📝 Note: To make Action Launcher available to Financial Services Cloud users, assign the Industries Service Excellence permission set license.

SEE ALSO:

Salesforce Help: Action Launcher

Action Plans

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

> 📝 **Note:** Action Plans is available in Lightning Experience and included in Salesforce Government Cloud with Lightning Scheduler, Financial Services Cloud, Health Cloud, Education Cloud, Public Sector Solutions, and Consumer Goods Cloud.

SEE ALSO:

Salesforce Help: Action Plans

Actionable Relationship Center (ARC) in Financial Services Cloud

The Actionable Relationship Center (ARC) lets you view your customers' relationships in an easy-to-navigate graph. ARC helps you understand relationships among people and businesses by presenting them in interactive components. Build graphs with standard and custom objects, then add the ARC Relationship Graph component to page layouts to show your graphs. Customize node names, show fields, and object and record actions so that your users can easily view, edit, delete, and create records during customer interactions.

Learn About ARC Versions

There are two versions of ARC available. Each version works with different components.

New ARC

This version of ARC lets you create and view custom ARC relationship graphs and pre-configured templates.

Available components:

- ARC Details Panel
- ARC Highlights Panel
- ARC Relationship Graph
- ARC Einstein Relationships Insights

Original ARC

This version of ARC lets you view pre-configured ARC relationship graphs.

Available components: ARC Financial Services Cloud

Get Started

Set Up Actionable Relationship Center Permissions in Financial Services Cloud

Set up the Actionable Relationship Center (ARC) to start building relationship graphs and allow your users to interact with graphs on record pages. These setup steps are the same regardless of which version of ARC that you plan to use.

Create and View Custom ARC Relationship Graphs in Financial Services Cloud

Use this version of the Actionable Relationship Center (ARC) to build custom ARC Relationship Graphs with objects that are important to your users. Add the ARC Relationship Graph component to record pages to let your users view and interact with records. Customize card names, display fields, and object and record actions so your users can easily navigate and engage with records during customer interactions.

View Preconfigured ARC Relationship Graphs for Financial Services Cloud (Original ARC)

Financial Services Cloud users can use this version of the Actionable Relationship Center (ARC) to view preconfigured relationship graphs. Add the ARC Financial Services Cloud component to record pages to let your users see both Financial Services Cloud relationships and related list relationships in one view on Account records.

Set Up Actionable Relationship Center Permissions in Financial Services Cloud

Set up the Actionable Relationship Center (ARC) to start building relationship graphs and allow your users to interact with graphs on record pages. These setup steps are the same regardless of which version of ARC that you plan to use.

📝 **Note:** Keep these things in mind.

- Both versions of the Actionable Relationship Center use the same permission set.
- ARC requires that the Association Type field of the Account-Account Relationship object has active picklist values with the following API Names: Group, Member, and Peer.

Create an Actionable Relationship Center Permission Set in Financial Services Cloud

Allow users to create and view ARC Graphs.

Assign Actionable Relationship Center Permissions to Financial Services Cloud Users

Give users access to the Actionable Relationship Center and ARC components.

SEE ALSO:

Set Up Association Types

Salesforce Help: Create and Configure Lightning Experience Record Pages

Create an Actionable Relationship Center Permission Set in Financial Services Cloud

Allow users to create and view ARC Graphs.

📝 **Note:** A user's level of access to objects and records in your Salesforce org represents their level of access to cards and actions on a graph. For example, if a user has read access to Opportunities object, they can only view opportunity records on a graph, regardless of the actions on the node.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

2. Click **Clone** next to the Financial Services Cloud Extension permission set.

3. Enter label, such as `FSC with ARC`.

4. Clear the API name field and then press Tab to continue to the next field, so that the API name auto-populates.

5. Optionally, edit the Description field.

6. Save your changes.

7. In the Permission Sets list, click the name of the newly created permission set.

8. Click the **System Permissions** link.

9. Click **Edit**.

10. Select the **Access Actionable Relationship Center** permission set.

11. Save your changes.

Assign Actionable Relationship Center Permissions to Financial Services Cloud Users

Give users access to the Actionable Relationship Center and ARC components.

> ✒ **Note:** Users must have at least read visibility to objects and fields referenced or displayed on a graph to view the corresponding cards and fields on the graph.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

2. Click the newly created permission set, for example **FSC with ARC**.

3. Click **Manage Assignments**, and then click **Add Assignments**.

4. Select users and then click **Assign**.

> ### EDITIONS
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Create and View Custom ARC Relationship Graphs in Financial Services Cloud

Use this version of the Actionable Relationship Center (ARC) to build custom ARC Relationship Graphs with objects that are important to your users. Add the ARC Relationship Graph component to record pages to let your users view and interact with records. Customize card names, display fields, and object and record actions so your users can easily navigate and engage with records during customer interactions.

> ✒ **Note:** Summer '22 offers a new version of Actionable Relationship Center. For instructions on using this new version, you're in the right place.

> ✒ **Note:** To learn how to create a custom ARC relationship graph, find the steps in the Extend Your Industries Cloud with Common Features guide.

> ✒ **Note:** Before you start, confirm that the Financial Services Cloud (FSC) package is installed and person accounts are configured.

Create more than one relationship graph per object to show relevant customer information to your users. Add unique graphs to page layouts so users see customer relationship data based on their profile. For example, a Financial Advisor works with clients to help them achieve financial goals. They need an easy-to-understand view of their client's household, such as who is the primary point of contact, family member relationships, financial summary at a glance, family assets, and ability to make updates for life events. Whereas Investment Bankers focus on helping companies conduct major business operations. They need to know who the key executives are, what the account structure and history looks like, the latest news in the company or industry, and view who is working on deals.

> 🛑 **Important:** Users must have at least read visibility to objects and fields referenced or displayed on a graph to view the corresponding cards and fields on the graph.

Configure a Group Relationships Node

Configure node properties to show accounts that are contained within a parent account. For example, a parent company account can have a group relationship with one or more subsidiary accounts. The relationship (association type) is account-account relationship (group).

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

User Permissions Needed

To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

   🛇 Important: The Root Node object must be Account to configure the Group Relationship Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Account
Relationship Type	Many-to-Many
Junction Object	Account-Account Relationship
Parent Node Lookup Field	Account
Object Lookup Field	Related-Account

5. Click **Filter** and define the following filter criteria:

Field Name	Field Value
Apply filter to	Junction
Field	Association Type
Operator	equals
Value	Group

6. Click **Done**. Configure the node Display and Actions tabs.

7. Save your graph.

SEE ALSO:

Create a Relationship Graph in ARC

Configure a Related Accounts Node

Lists accounts that have non-hierarchical associations to the selected account. For example, a
business account can have a peer relationship to another business that is an important supplier.
The relationship (association type) is account-account relationship (peer).

User Permissions Needed

To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

🛑 **Important:** The Root Node object must be Account to configure the Related Accounts Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Account
Relationship Type	Many-to-Many
Junction Object	Account-Account Relationship
Parent Node Lookup Field	Account
Object Lookup Field	Related-Account

5. Click **Filter** and define the following filter criteria:

Field Name	Field Value
Apply filter to	Junction
Field	Association Type
Operator	equals
Value	Peer

6. Click **Done**. Configure the node Display and Actions tabs.

7. Save your graph.

SEE ALSO:

Create a Relationship Graph in ARC

Configure a Member Relationships Node

Lists accounts that are currently tied to a parent account. For example, a trust that holds assets for the household. The relationship (association type) is account-account relationship (member).

User Permissions Needed	
To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

   ⊘ Important: The Root Node object must be Account to configure the Member Relationships Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Account
Relationship Type	Many-to-Many
Junction Object	Account-Account Relationship
Parent Node Lookup Field	Account
Object Lookup Field	Related-Account

5. Click **Filter** and define the following filter criteria:

Field Name	Field Value
Apply filter to	Junction
Field	Association Type
Operator	equals
Value	Member
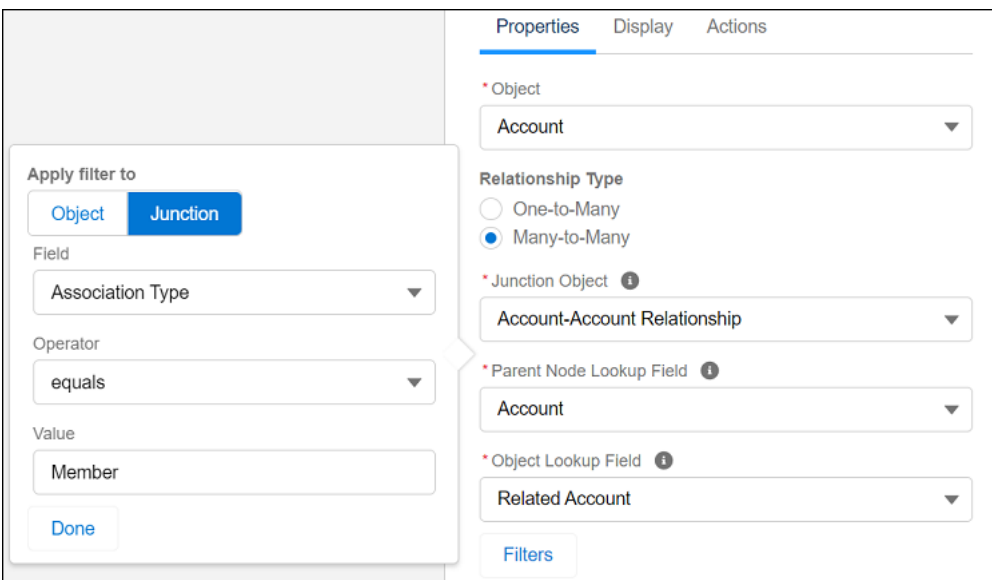
6. Click **Done**. Configure the node Display and Actions tabs.

7. Save your graph.

SEE ALSO:

Create a Relationship Graph in ARC

Configure a Members Node

Lists person accounts that fulfill a specified role for the selected account. For example, a person
account can have a member relationship to a household account. The relationship (association
type) is account-contact relationship, where the contact is a Person Account record.

User Permissions Needed

To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

   🛇 Important: The Root Node object must be Account to configure the Member Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Person Account
Relationship Type	Many-to-Many
Junction Object	Account-Contact Relationship
Parent Node Lookup Field	Account
Object Lookup Field	Contact
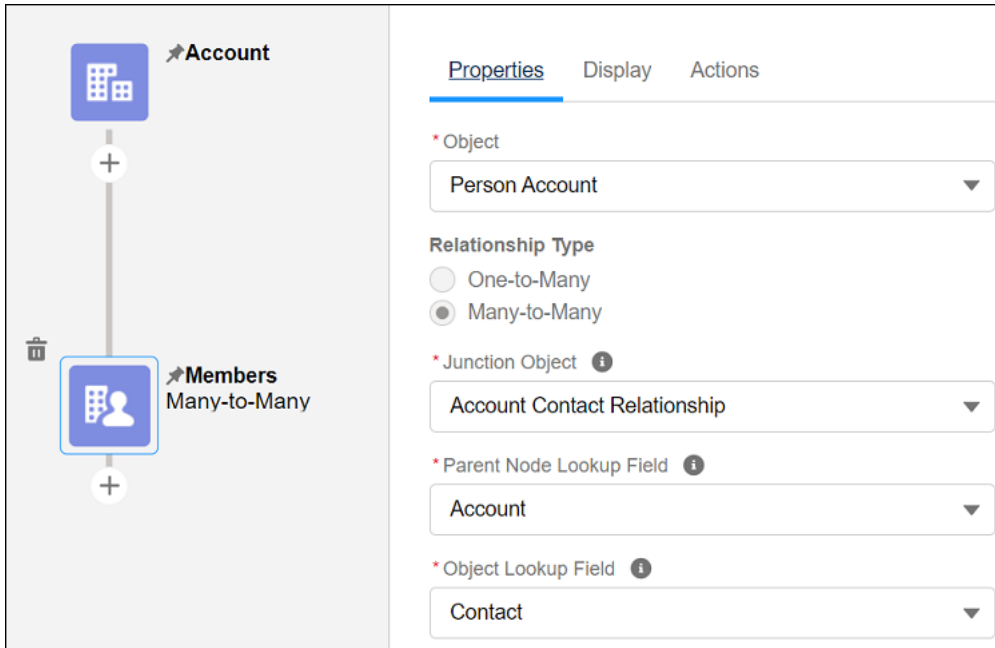
5. Click **Done**. Configure the node Display and Actions tabs.

6. Save your graph.

SEE ALSO:

  Create a Relationship Graph in ARC

Configure a Related Contacts Node

Lists contacts that fulfill a specified role for the selected person account. The relationship (association type) is contact-contact relationship.

User Permissions Needed	
To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

📝 **Note:** This card doesn't display standard contacts that look up to accounts. To view contacts that look up to accounts in ARC, add the Contacts related list to the page layout that you use to display Account (Business) objects.

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

   ⛔ **Important:** The Root Node object must be Person Account to configure the Related Contacts Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Contact
Relationship Type	Many-to-Many
Junction Object	Contact-Contact Relationship
Parent Node Lookup Field	Contact
Object Lookup Field	Contact

5. Click **Done**. Configure the node Display and Actions tabs.

6. Save your graph.

SEE ALSO:

Create a Relationship Graph in ARC

Configure a Household Node

Lists household accounts that are related to the selected person account, such as households or
trusts that the person belongs to.

User Permissions Needed

To create an ARC Relationship Graph:	Financial Services Cloud Extension
	AND
	Customize Application

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

   🛑 Important: The Root Node object must be Contact to configure the Household Node.

3. Click the plus icon to add a child node.

4. On the Properties tab, configure the node properties as follows:

Field Name	Field Value
Object	Account
Relationship Type	Many-to-Many
Junction Object	Account-Contact Relationship
Parent Node Lookup Field	Contact
Object Lookup Field	Account

5. Click **Filter** and define the following filter criteria:

Field Name	Field Value
Apply filter to	Object
Field	Record Type
Operator	equals
Value	Household

6. Click **Done**. Configure the node Display and Actions tabs.

7. Save your graph.

SEE ALSO:

[Create a Relationship Graph in ARC](#)

Use Default Templates in ARC for Financial Services Cloud

Use preconfigured ARC relationship graph templates to build relationship graphs.

> 📝 **Note:** Before you start, confirm that the Financial Services Cloud (FSC) package is installed and person accounts are configured.

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph**, then click **Default Templates**.

3. Click **B2B Graph** or **B2C Graph**.

In a B2B Graph (Business to Business Relationship Graph), preconfigured nodes show subsidiaries, employees, opportunities, and cases for your commercial clients.
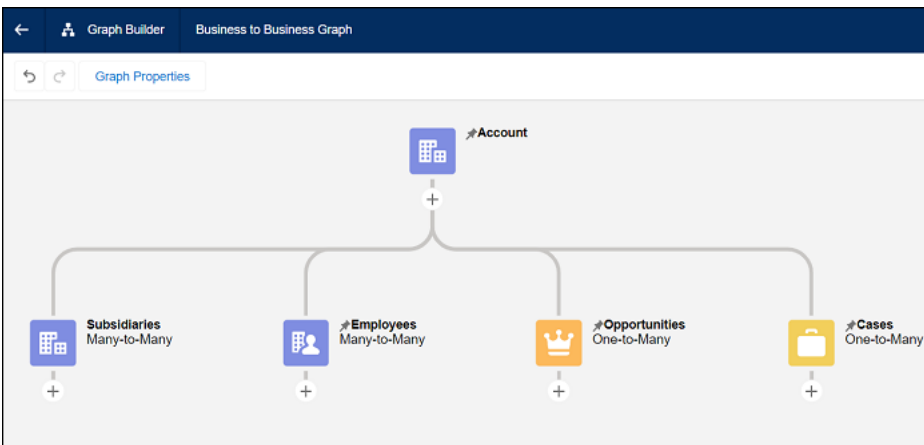
In a B2C Graph (Business to Customer Relationship Graph), preconfigured nodes show members, related households, and household accounts for your clients.
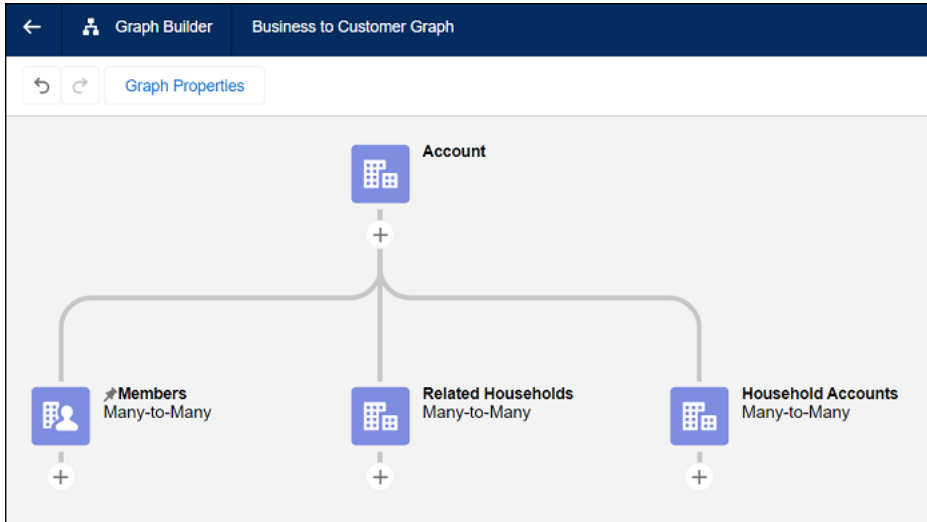
4. (Optionally) Configure the Actions tab for each node.

5. (Optionally) Add more child nodes.

6. Save your changes.

SEE ALSO:

   Create a Relationship Graph in ARC

   Get Ready to Use Financial Services Cloud

Einstein Relationship Insights on an ARC Graph

Show Account and Contact record web recommendations in ARC using the ARC Einstein Relationship Insights component. Get deeper relationship insights to build stronger customer relationships. View the recommendations as smart tags or a graph.

For example, on an ARC Relationship Graph, click an Account record to see its relationship insights. In the chart view, the colorful recommendations are records in your Salesforce org and the gray recommendations are new. Click a recommendation to take actions, such as link the recommendation to the record or create a new record.

Before you start, confirm that the Financial Services Cloud (FSC) package is installed and person accounts are configured. Also confirm that you configured a person account as the additional person record object in the Einstein Relationship Insights setup page.
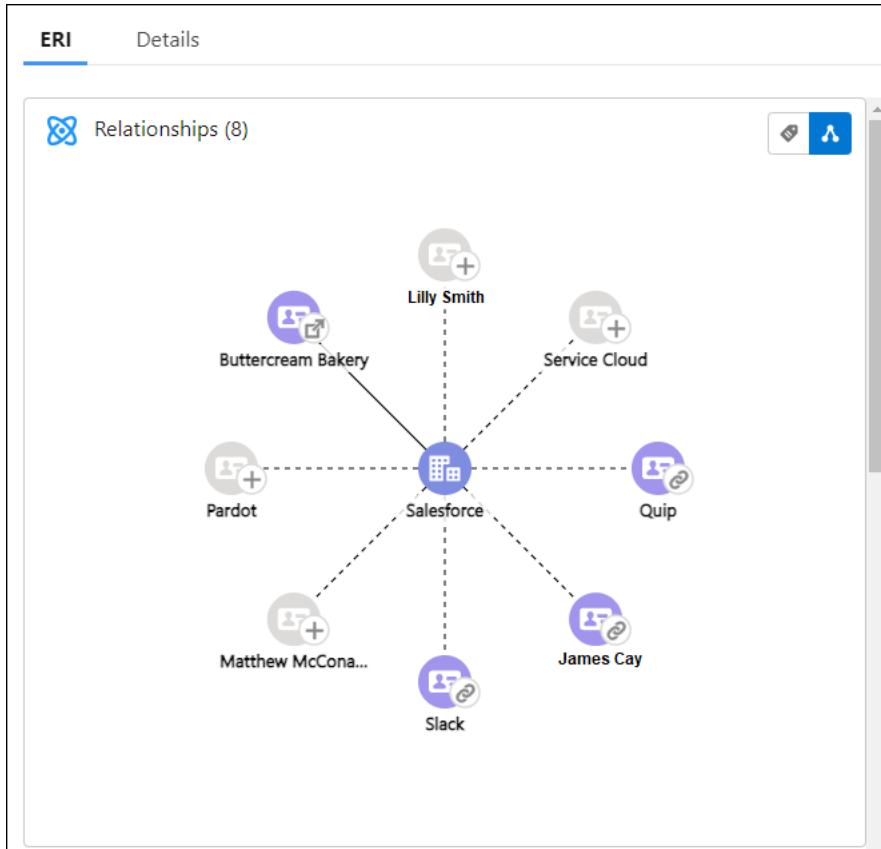
[Set Up Einstein Relationship Insights on ARC](#)

Assign, enable, manage, and add Einstein Relationship Insights for the Actionable Relationship Center.

[View and Act on Web Recommendations on the ARC Einstein Relationship Insights Component](#)

Select a record on the ARC Relationship Graph to view and act on web recommendations in the ARC Einstein Relationship Insights component.

SEE ALSO:

[Einstein Relationship Insights](#)

Extend Salesforce with Clicks, Not Code: Create and Configure Lightning Experience Record Pages

Manage Accounts and Contacts: Person Accounts

Financial Services Cloud Installation Guide: Install the Managed Package

Set Up Einstein Relationship Insights on ARC

Assign, enable, manage, and add Einstein Relationship Insights for the Actionable Relationship
Center.

[Assign Einstein Relationship Insights Licenses to ARC Users](#)

To provide your users with access to Einstein Relationship Insights, assign a license.

[Enable and Configure Einstein Relationship Insights](#)

Confirm that Einstein Relationship Insights is enabled in your Salesforce org. Einstein Relationship
Insights is needed to configure the active record, person record, and company record objects.
Use the record of interest to see recommended relationships. Enable content sources so that
your users can explore relationships. For example, connect with Twitter as a content source
and enable your users to search for content on Twitter and view recommended relationships based on the attachments.

[Manage Access to the Einstein Relationship Insights App](#)

Confirm that your users have access to the connected app so they can access Einstein Relationship Insights.

[Add the ARC Einstein Relationship Insights Component to Page Layouts](#)

To display the ARC Einstein Relationship Insights component to your users, add the component to the pages that correspond to the
selected active record object, people object, and company object that you set up in the previous step.

Assign Einstein Relationship Insights Licenses to ARC Users

To provide your users with access to Einstein Relationship Insights, assign a license.

1. From Setup, in the Quick Find box, enter `Permission`, and then select **Permission Sets**.

2. Select one of the two permission sets:

   To assign the Einstein Relationship Insights Growth license, select **ERI Growth User**.

   To assign the Einstein Relationship Insights Starter license, select **ERI Starter User**.

   📝 Note: For Salesforce orgs with the Restricted Twitter license, also select **ERI Twitter
   User**.

3. Click **Manage Assignments**.

4. On the Assigned Users page, click **Add Assignments**.

5. Select the users that you want to assign licenses to, and click **Assign**.

Enable and Configure Einstein Relationship Insights

Confirm that Einstein Relationship Insights is enabled in your Salesforce org. Einstein Relationship Insights is needed to configure the active record, person record, and company record objects. Use the record of interest to see recommended relationships. Enable content sources so that your users can explore relationships. For example, connect with Twitter as a content source and enable your users to search for content on Twitter and view recommended relationships based on the attachments.

Before using custom objects for the Active Record Object, Person Record Object, or Company Record Object field, confirm that the objects have search enabled within Salesforce.

1. From Setup, in the Quick Find box, enter `Einstein`, and then select **Einstein Relationship Intelligence**.

2. Turn on **Einstein Relationship Insights**.

3. Select an active record object. A record based on this object is either created or updated when there's a response.

This field is applicable only for users with the Einstein Relationship Insights Growth license.

4. Select a person record object. A record based on this object is either created or updated when there's a response.

    Most customers select the contact object.

5. Select the values for Display Field 1, Display Field 2, and Display Field 3.

    The display fields let your user select the correct matching record. Multiple matching records exist for a contact or person object.

6. To add more person records, click **Add Person Record Object**.

    You can add up to five person record objects. You can also select the record type and the display fields.

7. Select a company record object and the display fields. A record based on this object is either created or updated when there's a response.

    You can add up to five company record objects. Most users select the account object.

8. To add more company records, click **Add Company Record Object**.

    You can also select their display fields.

9. Save your changes.

10. Under Content Sources, move the content sources that you want to enable for your users to the selected list, and then save your changes.
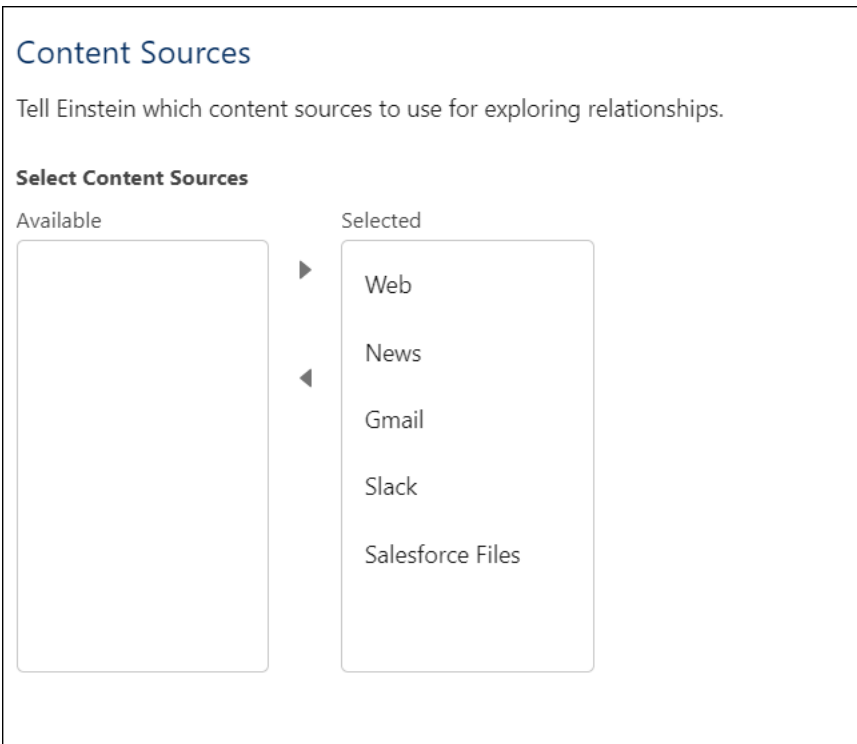
> **Note:** When you disconnect Slack as a content source, ask the Salesforce support team to delete the workspace content. To reconnect with Slack, add Slack as a content source and notify your users to connect with the Slack workspace.

SEE ALSO:

Extend Salesforce with Clicks, Not Code: Manage Custom Objects

Extend Your Industries Cloud with Common Features: Manage Access to the Einstein Relationship Insights App

Manage Access to the Einstein Relationship Insights App

Confirm that your users have access to the connected app so they can access Einstein Relationship Insights.

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

2. Select the profile that you want to give access to.

3. Click **Edit**.

4. Under Connected App Access, select **Einstein Relationship Insights Canvas App**.

Connected App Access	
Einstein Relationship Insights Canvas App	☑
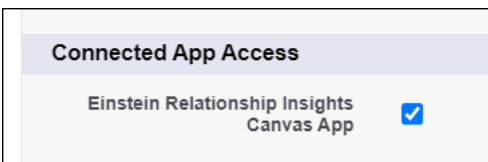
> **Note:** Salesforce recommends that you don't change the connected app name.

5. Save your changes.

Repeat this process for any profiles that need access.

SEE ALSO:

Extend Your Industries Cloud with Common Features: Enable and Configure Einstein Relationship Insights

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To view ARC Einstein Relationships Insights
- Financial Services Cloud Extension

  AND

  FSC Package

  AND

  Einstein Relationship Insights Starter

  OR

  Einstein Relationship Insights Growth

Add the ARC Einstein Relationship Insights Component to Page Layouts

To display the ARC Einstein Relationship Insights component to your users, add the component to the pages that correspond to the selected active record object, people object, and company object that you set up in the previous step.

1. From Setup, click **Object Manager**.

2. Select an object, then click **Lightning Record Pages**.

3. Select a page layout, then click **Edit**.

4. In Lightning App Builder, drag ARC Einstein Relationships Insights from the Components panel to the Lightning page canvas and position it where you want it to appear.

5. Configure the properties panel.

6. Save your changes.

USER PERMISSIONS

To view ARC Einstein Relationships Insights

- Financial Services Cloud Extension

  AND

  FSC Package

  AND

  Customize Application

  AND

  Einstein Relationship Insights Starter

  OR

  Einstein Relationship Insights Growth

View and Act on Web Recommendations on the ARC Einstein Relationship Insights Component

Select a record on the ARC Relationship Graph to view and act on web recommendations in the ARC Einstein Relationship Insights component.

For example, on an ARC Relationship Graph, click an account record to see its relationship insights. In the chart view, the colorful recommendations are records in your Salesforce org and the gray recommendations are new. Take actions such as link a recommendation to the record or create a record.

1. Navigate to a record page and click the ARC graph tab.

2. Select an account or contact record card.

3. In the ARC Einstein Relationship Insights component, view web recommendations for the selected record.

4. On the component, click the toggle to switch from the graphical version to the smart tags version.

5. To create a record, click the plus icon on a gray web recommendation.

    a. Select Object Type and click **Next**.

    b. Select record type and click **Next**.

    c. Details from the selected web recommendation are populated in the record window.

    d. Add more details as needed.

    e. To create the record, click **Save**.

6. Link the new record to the record selected on the ARC graph. In the New Relationship window:

> **Note:** To link records, the Financial Services Cloud Managed Package must be installed in your Salesforce Org. If you can't complete these steps, contact your Salesforce admin for help.

a. Confirm that the first record is the one that you want to link to the new record.

b. Confirm that the second record is the record that you created.

c. To link the two records, select the related role.

d. Select **Active**.

e. Select an Association Type.

f.

Click **Save**.

The new record displays on the ARC graph.

SEE ALSO:

Einstein Relationship Insights on an ARC Graph

Create Expanded Account Relationships in Group Builder

Set Up Relationship Groups

View Preconfigured ARC Relationship Graphs for Financial Services Cloud (Original ARC)

Financial Services Cloud users can use this version of the Actionable Relationship Center (ARC) to view preconfigured relationship graphs. Add the ARC Financial Services Cloud component to record pages to let your users see both Financial Services Cloud relationships and related list relationships in one view on Account records.

> **Note:** Summer '22 offers a new version of Actionable Relationship Center. For instructions on using this new version, see Create and View Custom ARC Relationship Graphs on page 168.

Use the view-only version of ARC with the Financial Services Cloud Relationship Map. For a more customizable experience, check out Create and View Custom ARC Relationship Graphs where you can build custom graphs to show client relationships that are most important to your users.

> **Note:** ARC is supported for orgs that have implemented the Person account Model. ARC isn't supported for orgs that use the Individual Model. ARC requires that the Association Type field of the Account-Account Relationship object has active picklist values with the following API Names: Group, Member, and Peer.
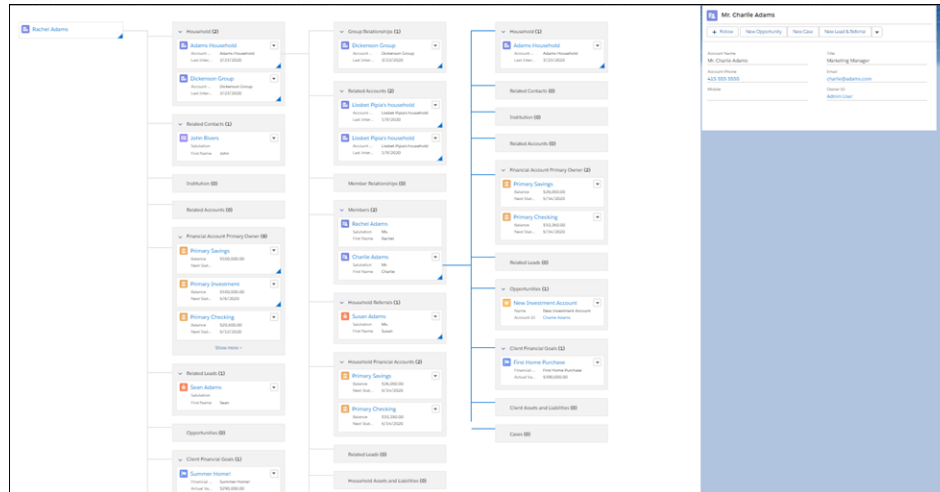
[Verify Read Access to Fields](#)

To view an ARC graph, users must have read access to the fields on the Contact, Account, Reciprocal Role, Account-Contact Relationship, Account-Account Relationship, and Contact-Contact Relationship objects.

[Add ARC - Financial Services Cloud Component to Page Layouts](#)

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

[Explore Relationship Groups with ARC](#)

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

[View and Manage Related Lists with ARC](#)

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

[Create and Edit Account Relationships with ARC](#)

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

[Considerations and Limitations for Actionable Relationship Center (Original ARC)](#)

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

SEE ALSO:

[How Is a Person Modeled?](#)

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

Verify Read Access to Fields

To view an ARC graph, users must have read access to the fields on the Contact, Account, Reciprocal Role, Account-Contact Relationship, Account-Account Relationship, and Contact-Contact Relationship objects.

Verify and grant read access to fields listed in the table.

Object Name	Field Name
Contact	Name AccountID
Account	Name
Reciprocal Role	InverseRole__c
Account Contact Relationship	Roles AccountId IsActive ContactId PrimaryGroup__c IncludeInGroup__c Primary__c IsDirect Rollups__c
Account Account Relationship	Role__c Active__c Account__c RelatedAccount__c AssociationType__c
Contact Contact Relationship	Role__c StartDate__c EndDate__c Contact__c Active__c RelatedContact__c

1. From Setup, in the Quick Find box, enter `profiles`, and then click a profile.

2. Under Field-Level Security, find Contact, and click **View**.

3. Validate that the profile has Read permissions to the fields. If not, grant the permissions and save your changes.

4. Complete the steps for the other objects.

SEE ALSO:

Manage Data Access: Field-Level Security

Add ARC - Financial Services Cloud Component to Page Layouts

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

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

1. From the Setup menu on a record page, select **Edit Page**.

2. In Lightning App Builder, drag **ARC - Financial Services Cloud** onto your page.

3. (Optional) In the ARC - Financial Services Cloud properties pane, enter a label like ARC.

4. (Optional) To display Compliant Data Sharing participants for selected records in the detail panel, select **Show participants**.

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

5. (Optional) Add filters to limit users' ability to view the component.

   a. Click **Add Filter**.

   b. Select **Advanced**

   c. To filter who can see the component, click **Select**.

   d. Select a field type of **Device**, **User**, **Permissions**, or **Record** from the dropdown list.

   e. Select a field from the dropdown list.

   f. Click **Done**.

   g. Select an operator for the filter.

   h. Enter the value or values to use for the filter.

   i. Click **Done**.

6. Save your changes.

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

SEE ALSO:

Salesforce Help: Dynamic Lightning Pages

Salesforce Help: Create and Configure Lightning Experience Record Pages

Explore Relationship Groups with ARC

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

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

1. Account-account relationships. Relationships between accounts are categorized by the predefined Association Types:

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

- Group: indicates that a first Account is a group that contains other accounts. For example, a parent company account can have a Group relationship with one or more subsidiary accounts.
- Member: Indicates that the first account belongs to the second account in some way. For example, a person account can have a Member relationship to a household account.
- Peer: Indicates that the first and second accounts are related, but don't contain or control each other. For example, a business account can have a Peer relationship to another business that is an important supplier.

2. Account-contact relationships. For example, a business can have an account-contact relationship with a person account that is its employee. ARC shows account-contact relationships that relate to person account record types, but not to individual record types.

3. Related lists of other records. The lists that are shown differ based on the type of record that is selected in the ARC interface.

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

Table 11: Relationship Cards for Households

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

Table 12: Relationship Cards for Business Accounts

Card	Relationship (Association Type)	Description
Group Relationships	Account-account relationship (Group)	Lists accounts that are contained within a parent account, such as subsidiaries controlled by a parent company.
Related Contacts	Account-contact relationship, where the contact is a Person Account record	Lists person accounts that fulfill a specified role for the selected account. Note: This card doesn't display standard contacts that look up to accounts. To view contacts that look up to accounts in ARC, add the Contacts related list to the page layout that you use to display Account (Business) objects.

Card	Relationship (Association Type)	Description
Related Accounts	Account-account relationship (Peer)	Lists accounts that have non-hierarchical associations to the selected account, such as supplier companies.
Member Relationships	Account-account relationship (Member)	Lists accounts that are currently tied to a parent account, such as person accounts that are employees of the business.

Table 13: Relationship Cards for Person Accounts

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

SEE ALSO:

View and Manage Related Lists with ARC

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

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

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Table 14: Related Lists Supported in ARC

Object	Allowed Related Lists
Account (Person, Group, and Business combined)	- Household Financial Accounts - Household Financial Goals - Household Opportunities - Household Referrals - Financial Account Primary Owner - Client Financial Goals - Household Assets and Liabilities - Client Assets and Liabilities - Related Leads - Opportunities - Cases - Custom objects
Contact	- Opportunities - Cases - Related Accounts (Shows Account Contact Relationship with fields) - Notes and Attachments - Custom objects
Lead and Referral	- Notes and Attachments - HTML Email Status - Custom objects
Opportunity	- Products (OpportunityLineItem) - Notes and Attachments - Partners - Residential Loan Applications - Insurance Policies - Custom objects
Financial Account	- Opportunities - Financial Holdings - Financial Account Transactions - Approval History - Cases - Custom objects

Object	Allowed Related Lists
Financial Goal	• Approval History • Custom objects
Product	• Financial Account products • Price Books • Assets • Cases • Custom objects
Case	• Case History • Work Orders • Team Members • Custom objects
Asset and Liability	• Assets and Liabilities History • Approval History • Notes and Attachments • Custom objects
Financial Holding	• Approval History • Notes and Attachments • Custom objects

Create and Edit Account Relationships with ARC

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

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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

- Create account-contact relationships, like adding a member to a household account.

- Create account-account relationships, like relating an accounting firm in an Advisor role to a business account.

- Edit account-account and account-contact relationships.

- Create related records for an account, such as a new Financial Account for a person, or a new Opportunity for a business account.

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

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

1. From the account page for a person account, click the **ARC** tab.

2. On the Business card in the ARC interface, click **New**.

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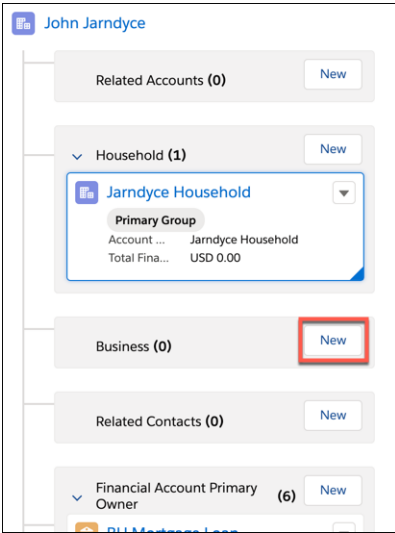
3. On the standard form for creating an Account-Contact Relationship, enter details about the person's membership and role in the business.
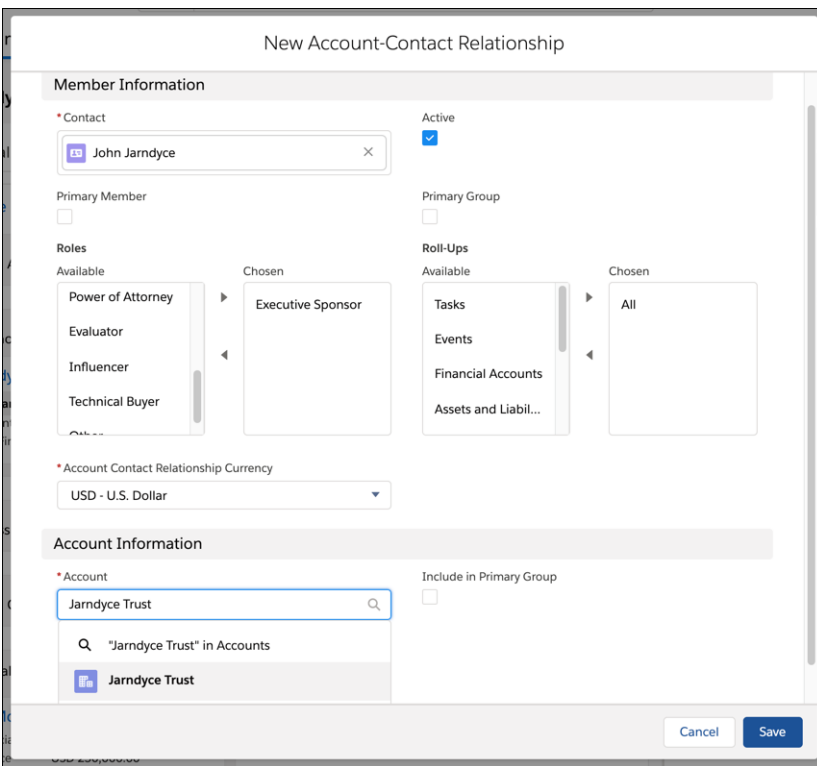
4. Click in the Account field. Search for and select a business account, or select **+ New Account** to create a new business account.

5. Click **Save**.

6. The new business account relationship appears in the ARC interface. If the relationship does not show in the list immediately, refresh the page to load it.

7. To edit an existing relationship, click the down arrow on the related account's card and select **Edit Relationship**.
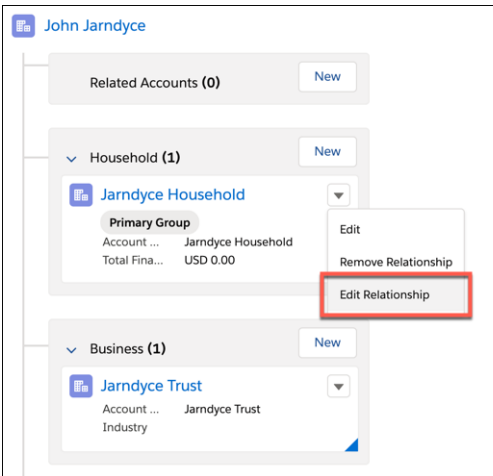
Considerations and Limitations for Actionable Relationship Center (Original ARC)

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

> **Note:** Summer '22 offered a new version of Actionable Relationship Center. For instructions on using this new version, see Create and View Custom ARC Relationship Graphs on page 168.

General

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

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

ARC isn't available in the Salesforce mobile app.

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

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

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

ARC supports the following screen resolutions for Internet Explorer 11:

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

ARC - Financial Services Cloud Component

The ARC - Financial Services Cloud component is used in the older version of ARC.

- This component isn't available in Experience Cloud.
- This component isn't extensible to packages.

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

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

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

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

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

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

SEE ALSO:

> *Get Started with Salesforce*: Considerations for Microsoft Internet Explorer
>
> *Get Started with Salesforce*: Supported Browsers for Lightning Experience
>
> *User Interface API Developer Guide* : Supported Objects

Ensure Privacy of Customers With Audit Trail

Audit Trail lets service agents inspect customer identity verification logs, detect potential cases of identity fraud, and meet audit compliance standards. Audit Trail works with customer identity verification records, which are created when the CSRs use the Verify Customer Identity flow to verify the customer's identity.

SEE ALSO:

> *Salesforce Help*: Audit Trail

EDITIONS

Available in: Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions where the Financial Services Cloud license is enabled.

Branch Management

Track branch performance and productivity with Branch Management.

The Branch Management data model, console app, and Record Association Builder enable branch managers and admins to track the work output of branches, employees, and customer segments. Branch Management works with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

The Branch Management data model lets you define your branch structure and employee and partner assignments so you can track activities and performance by branch.
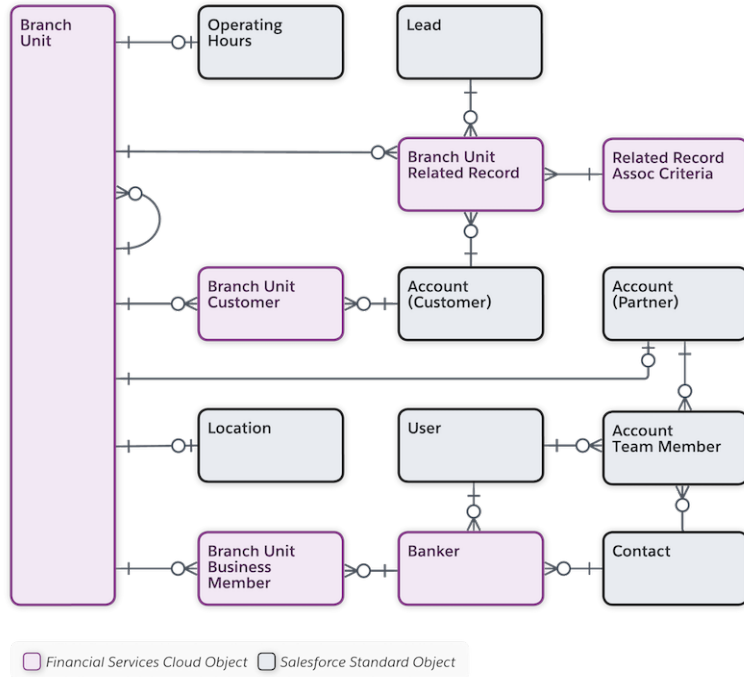
Branch Unit is the central object in the branch management data model. Branch unit records store basic information such as the branch's name, its parent branch, and its branch manager. Capture more branch information by relating objects like Location and Operating Hours.

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

Use the Branch Unit Related Record to track data about the records that are created at your branch. For example, identify the branch and user that created the record and the association criteria that triggered the record creation.

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

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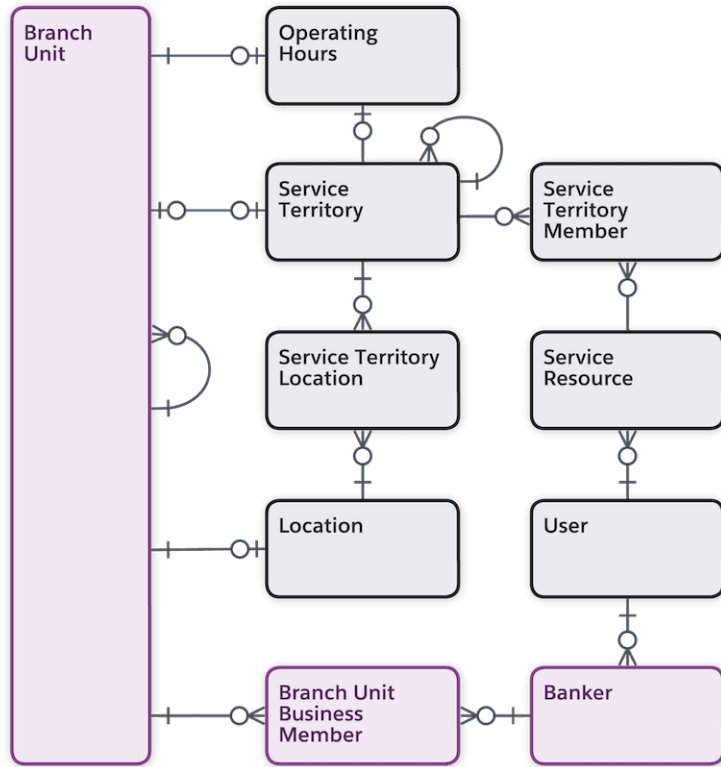
Financial Services Cloud Object ☐ Salesforce Standard Object

Configure Branch Management

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

Work with Branch Management

The Branch Console app provides quick access to branch management tools. Branch managers or admin users define branch units and hierarchies, and enable bankers and other business members for assignment to specific branches. Bankers and other users select the branch they're currently assigned to so that leads and accounts are associated with the correct branch.

Considerations and Limitations for Branch Management

Here are some things to keep in mind as you implement Branch Management features.

Configure Branch Management

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

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

Assign Permissions to Users

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

Grant Access to Branch Management Objects

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

Add the Branch Selector Component to Apps

Place the Branch Selector utility bar component in your Salesforce app to let bankers choose their current branch while working. Give users the flexibility to search for and add new branches or remove branches that are no longer relevant to them.

Add Branch Unit Customer Related List to the Account Page Layout

Customize the Account page layout by adding the Branch Unit Customer related list to display branches an account is related to.

Assign Permissions to Users

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

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

1. Create a permission set with the Branch Management permissions enabled.

    a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

    b. Click **Clone** next to the Financial Services Cloud Extension permission set.

    c. Enter a label for your permission set, such as `FSC with Branch Management.`

    d. Clear the API name field and then tab to the next field, so the API name fills in automatically.

    e. (Optional) Change the Description field if desired.

    f. Click **Save**.

    g. In the Permission Sets list, click the name of the permission set you just created to edit it.

    h. Click the **System Permissions** link.

    i. Click **Edit**.

    j. Enable the **User license to access Branch Management in Financial Services Cloud** permission.

    k. Click **Save**.

2. Assign the permission set to users.

    a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

    b. Click the name of the permission set that you created earlier, such as **FSC with Branch Management**.

    c. Click **Manage Assignments**, and then click **Add Assignments**.

    d. Select the checkbox for each user who will use branch management features, and then click **Assign**.

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

SEE ALSO:

Salesforce Help: Licenses Overview

Financial Services Cloud Permission Set Licenses

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Grant Access to Branch Management Objects

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

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

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

1. From Setup, enter `Profiles` in Quick Find, then select **Profiles**.

2. Click the **Edit** link next to the profile you want to change.

3. In Standard Object Permissions, validate that this profile has Read, Create, Edit, and Delete permissions to the Branch Unit object. If not, grant those permissions and click **Save**.

4. Repeat this step for **Branch Unit Business Members, Branch Unit Customers,** and **Branch Unit Related Records**.

5. If your org uses Banker as the business member object for branch assignments, validate that this profile has Read, Create, Edit, and Delete permissions to the Banker object. If not, grant those permissions and click **Save**. If your org uses a different object for the business member relationship, grant permissions for that object instead.

6. Repeat steps 2 through 6 for any other user profiles you want to change.

SEE ALSO:

Salesforce Help: Edit Object Permissions in Profiles

EDITIONS
Financial Services Cloud is available in Lightning Experience.
Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Add the Branch Selector Component to Apps

Place the Branch Selector utility bar component in your Salesforce app to let bankers choose their current branch while working. Give users the flexibility to search for and add new branches or remove branches that are no longer relevant to them.

📝 **Note:** You can add Utility Bar components to apps whose App Type is Lightning, but not to Lightning (Managed) apps.

1. From Setup, enter `App Manager` in Quick Find. Then select **App Manager**.

2. Edit an existing Lightning app or click **New Lightning App**.

3. In the left-hand menu, click **Utility Items (Desktop Only)**.

4. Click **Add Utility Item** and select **Branch Selector**.

EDITIONS
Financial Services Cloud is available in Lightning Experience.
Available in: **Professional**, **Enterprise**, and **Unlimited** editions

USER PERMISSIONS
To use Branch Management:
• Financial Services Cloud Extension permission set
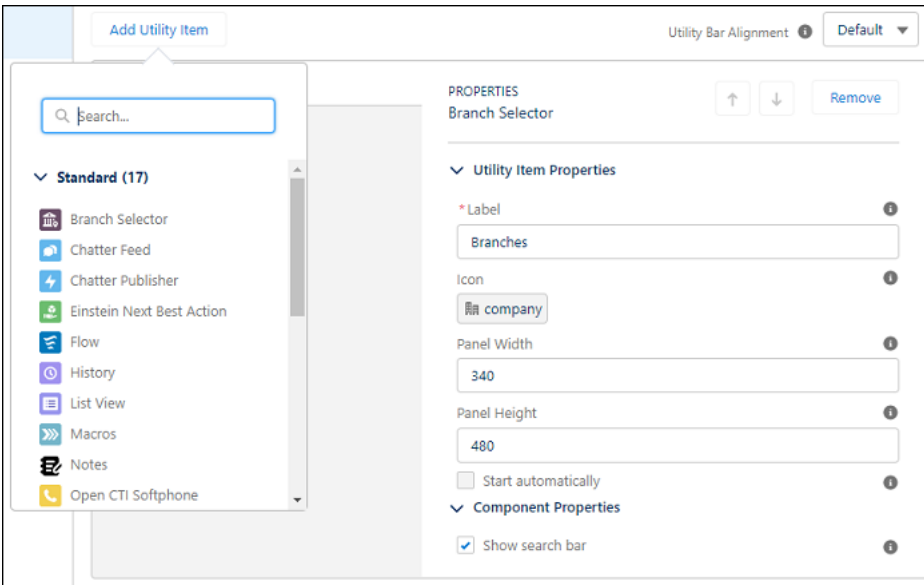
5. (Optional) Edit the Utility Item Properties.

6. Select to allow users to search for and assign themselves to active branches.

    Users can search for all active branches. When a user adds themselves to a branch where they don't have an active Branch Unit Business Member record, one is automatically created for them and set to active.

7. Click **Save**.

Add Branch Unit Customer Related List to the Account Page Layout

Customize the Account page layout by adding the Branch Unit Customer related list to display branches an account is related to.

1. From Setup, click **Object Manager**, and then select **Account**.

2. Click **Page Layouts** and select a page layout to edit, for example, **Account (Business) Layout**.

3. In the object palette, select **Related Lists**.

4. Drag the **Branch Unit Related List** from the object palette to the Related Lists container.

5. Save your changes.

Work with Branch Management

The Branch Console app provides quick access to branch management tools. Branch managers or admin users define branch units and hierarchies, and enable bankers and other business members for assignment to specific branches. Bankers and other users select the branch they're currently assigned to so that leads and accounts are associated with the correct branch.

Branch Management also includes predefined report types so that you can create reports and dashboards to gain insight into branch performance and productivity.

Create Branch Unit Records
Define your branches and branch hierarchy by creating branch unit records.

Create Banker Records

The Banker object represents users or contacts who are authorized to work in a banking capacity for one or more branches over time. Add banker records to let users view the branches they can work with, and choose their current branch for work attribution purposes.

Create Branch Unit Business Member Records

A branch unit business member links a branch unit and a banker. It enables a banker to select the branch where they're working that day so their customer interactions are associated with the correct branch.

Choose Your Branch with the Branch Selector

The branch selector allows you to select a current branch to associate your customer interactions. You can view branch details, search for, add, and remove branches from the branch selector without contacting your Salesforce admin.

Create Branch Unit Related Records

Track data about the records that are created at your branch using the Branch Unit Related Record.

Measure Performance with Branch Reportable Objects

Gain insights into productivity and performance by including branch management reportable objects in Lightning Reports.

Create Branch Unit Records

Define your branches and branch hierarchy by creating branch unit records.

A branch unit record stores information about a specific branch office, location, or organizational unit. You can define a hierarchy of branch units by using the Parent Branch field. You can optionally assign a user or contact to each branch unit as the branch manager.

Branch unit records can relate to Service Territory records to integrate with Service Cloud. They can also relate to account records to capture additional information about each branch, such as partner account information.

To create a new branch unit record:

1. From the Branch Management Console App, select **Branch Units** from the dropdown menu.

2. On the Branch Units tab, click **New**.

3. In the New Branch Unit window, enter a unique Name.

4. If the branch relates to an account, like an account representing a partner that runs the branch of business, search for and select an account.

5. (Optional) Specify values for the Branch Code, Type, Branch Manager, Operational State, Start Data, End Date, and Parent Branch. If you specify the dates, make sure that today's date is within the start and end dates for the new branch to be immediately usable.

6. Click **Active** to activate the new branch, then click **Save**

> 📝 **Note:** A branch unit can be selected by a banker only if the branch unit business member and branch unit are set to active.

Create Banker Records

The Banker object represents users or contacts who are authorized to work in a banking capacity for one or more branches over time. Add banker records to let users view the branches they can work with, and choose their current branch for work attribution purposes.

Before you begin, verify these details:

- Know the user's current branch assignment.
- Make sure that your Banker record page layout includes Current Branch Start Date and Current Branch fields.
- Make sure that your Branch Unit record page layout includes the Bankers related list.

1. From the Branch Management Console app, select **Bankers** or **Branch Units** from the dropdown menu.

   a. From Bankers, click **New**.

   b. From Branch Units, click a branch unit. Then, on the Bankers related list, click **New**.

2. A banker record represents a user or contact assignment to a specific branch unit. In the Name field, enter the name of the banker user, or a combination of the banker's name and the branch name.

3. In the New Banker window, select a record type from the **User or Contact** dropdown. Then search for and select a person.

4. (Optional) Enter more details about the banker.

   If you specify a branch in the Current Branch field, Salesforce creates a Branch Unit Business Member record for you automatically. If you add a banker without a branch assignment, create a Branch Unit Business Member and assign the Current Branch manually later.

5. Click **Save**.

Create Branch Unit Business Member Records

A branch unit business member links a branch unit and a banker. It enables a banker to select the branch where they're working that day so their customer interactions are associated with the correct branch.

> 💡 **Tip:** Salesforce creates a Branch Unit Business Member record automatically when you add a banker with a branch assignment. Make sure your Banker record page layout includes Current Branch Start Date and Current Branch fields. Then, on the Bankers tab or the Bankers related list of a Branch Unit record, click **New**. Specify a branch in the Current Branch field.

1. Select **Branch Unit Business Member** from the navigation bar.

   If you don't see Branch Unit Business Member, click **Edit** in the navigation bar menu, and then search for and add Branch Unit Business Member.

2. Click **New**.

3. Select the Banker icon from the Business Unit Member dropdown. Then search for and select a user.

4. Select a Branch Unit.

5. Select **Active** and save your changes.

> 📝 **Note:** A branch unit can be selected by a banker only if the branch unit business member and branch unit are set to active.

Choose Your Branch with the Branch Selector

The branch selector allows you to select a current branch to associate your customer interactions. You can view branch details, search for, add, and remove branches from the branch selector without contacting your Salesforce admin.

> 📝 **Note:** When a user adds themselves to a branch where they don't have an active branch unit business member record, it is automatically created and set to active.

1. From the App Launcher, select **Branch Management** app, or another app your Salesforce org uses.

2. Click **Branches** utility bar component.

   A list of branches displays. Current indicates the branch you're assigned to. All record interactions are attributed to your current branch.

3. Click the actions menu to remove a branch from the selector or view branch details.

4. Click **Search Branch Units...** and enter the name of a branch to search for and add a new branch to the branch selector.

5. Click **Select** to choose a new current branch.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use the Branch Selector:
- Financial Services Cloud Extension permission set

  AND

  Read, Create, and Delete on Branch Unit Business Member

  AND

  Read on Branch Unit

  AND

  Read and Edit on Banker
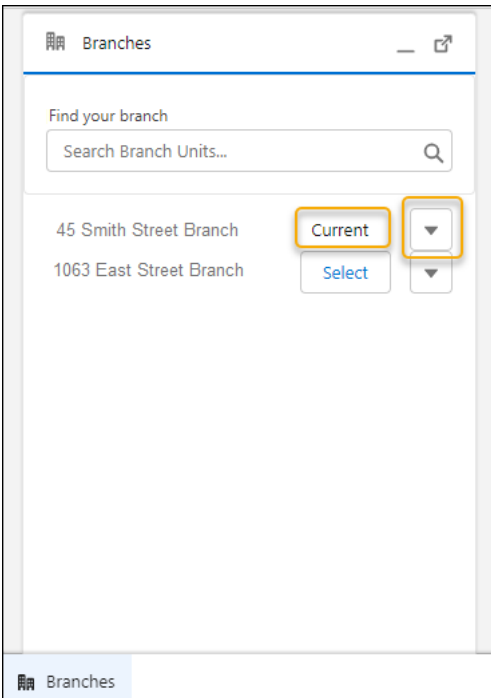
Create Branch Unit Related Records

Track data about the records that are created at your branch using the Branch Unit Related Record.

You can create custom fields and triggers to track record data that is most relevant to your branch. Create association criteria using record association builder to create branch unit related records to track data about records created at your branch. Add the Branch Unit Related Record related list to your Branch Unit page layout to view records.

For example, to track and report on who is the manager at a branch anytime a new lead is created, create a custom field on the branch unit related record and a trigger that updates that field based on the branch manager name from the branch unit.

> 📝 **Note:** If your Salesforce org already uses Branch Management, add the Branch Unit Related Record to your app.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Measure Performance with Branch Reportable Objects

Gain insights into productivity and performance by including branch management reportable objects in Lightning Reports.

Standard report types for Branch Management include Branches with Bankers with Opportunities. Branch Unit Related Record report types with Lead, Account, Contacts, and Opportunities.

Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are now available for creating reports with Branch Unit Related Record.

Most of the key branch management objects can be used in reports. First, define a report type that references branch-related objects, and then create reports using that type. The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

To create a custom report type for Branch Management:

1. From Setup, enter `report` in Quick Find, then select **Report Types**.

2. Click **New Custom Report Type**.

3. In the **Primary Object** picklist, select `Branch` or one of the other branch management objects.

4. Fill in additional information about the report type, then click **Next**.

5. (Optional) On the Step 2 page, select an object in the **B** object dropdown. Some branch management objects such as Branch Unit Customers and Branch Unit Related Records don't appear as related objects when Branch Unit is the primary object. To report on those objects, create a report type with Branch Unit Customer or Branch Unit Related Record as the primary object. You can then group the resulting report data by Branch Unit Name if desired.

6. Save your work.

7. To use the new report type, select it when creating a report. Then change the filters and outline details to customize your report.

> **Note:** If you are unable to see Related Record Association Criteria in your Branch Unit Related Record report, create a new Custom Report Type that references the Association Criteria object. Then use that report type to generate reports that include Association Criteria fields.

SEE ALSO:

   Salesforce Help: Set Up a Custom Report Type

Considerations and Limitations for Branch Management

Here are some things to keep in mind as you implement Branch Management features.

If you want to associate branches with underlying accounts, consider creating a record type for those accounts so you can keep them separate from other accounts, like customers and prospects.

There are no limits to the number of Branches or Bankers you can create.

A maximum of 100 branches can be shown in the Branch Selector component.

We recommend that you deactivate branches rather than deleting them if you're considering closing a branch and reallocating bankers.

The Branch Selector component isn't certified to work on Mobile.

Branch hierarchies and related service territory hierarchies aren't automatically synchronized.

The Branch Unit Customer and Branch Unit Related Record objects aren't available in Related List components.

For each account, you can only create one Branch Unit Customer Record per Branch Unit Record.

We recommend using a developer tool of your choice to mass assign records to Branch Units.

When you merge duplicate accounts that are associated with the same Branch Unit, there can be only one branch unit customer record associated to the duplicate accounts. If more than one branch unit customer record exists, delete branch unit customer records until there's only one branch unit customer record related to the duplicate accounts.

If you use a custom compact layout for the Branch Unit object, be sure to include the Active and Name fields on the layout so that users can select and update their branch.

EDITIONS
Financial Services Cloud is available in Lightning Experience.
Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Business Rules Engine

Simplify the process of determining eligibility or qualification and automate complex decision-making to find solutions faster using Business Rules Engine.

SEE ALSO:

   Salesforce Help: Business Rules Engine

EDITIONS
Available in: Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** editions.

Caller Identity Verification

Verify the identity of a caller before you share any sensitive information with them. Organizations across the world are required to comply with regulations that help to ascertain the customer's identity and provide protection from losses and fraud. Failure to follow these regulations has legal consequences. Organizations must ensure that any person who seeks confidential information must first prove their identity and access.

Caller Verification is available in Lightning Experience.

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

Financial institutions are required to comply with KYC (Know Your Customer) regulations to protect their customers from losses and fraud due to inappropriate and illegal fund transactions.

The details a person must provide to prove their identity vary depending on the business. For example, the call center agent can ask the person to confirm their social security number, birth date, or driver's license number.

The person contacting the call center could be a genuine customer, a parent or guardian if the customer is a minor, an authorized representative of a customer. No matter who the caller is, if they want sensitive information, an agent must verify the caller's identity first.

To use the Caller Identity Verification feature, customize the verification process to meet your specific business and legal requirements. Learn more about the verification flow templates so that you can configure the verification screen components according to your business requirements.

📝 **Note:** To make Caller Identity Verification available to Financial Services Cloud users, assign the Industries Service Excellence permission set license.

SEE ALSO:

Salesforce Help: Caller Identity Verification

Complaint Management

Complaint Management provides a streamlined process for service agents to capture and submit client complaints directly from a Person Account record. Case agents can also track and monitor submitted complaints. If you enable CRM Analytics and create a CRM App for Complaint Management, your customer experience managers can use the prebuilt dashboards to gain insights on complaints. You can also set up a self-service portal for your customer community users to let them directly file complaints on the portal.

Set Up Complaint Management

With Complaint Management, service agents can quickly capture customer complaints with a guided intake form.

Submit a Customer Complaint

Your service agents can capture and submit a customer complaint through the complaint intake OmniScript. A case is then created in Salesforce.

Enable Complaint Intake Process in a Self-Service Portal

Let your customer community users launch the complaint intake process directly from a self-service portal, such as the Financial Services Client Portal.

CRM Analytics for Complaint Management

The CRM Analytics app for Complaint Management gives your customer experience managers and complaint team managers quick insights on customer complaints.

Set Up Complaint Management

With Complaint Management, service agents can quickly capture customer complaints with a guided intake form.

Configure the Public Complaint Object

To store the financial account of a customer who is raising a complaint, add a field to the Public Complaint object.

Assign Complaint Management Permissions to Users

To use the complaint intake process, assign relevant permissions to your users.

Add Complaint Status Picklist Values

To indicate the status of a complaint, activate the picklist values.

Add Related Lists to the Case Page Layout

When a complaint is submitted, a case record and the associated public complaint and case participant records are created. To track and monitor complaints, add these records as related lists to the Case page layout.

Add Fields to the Public Complaint Page Layout

Add the fields that are required for complaint intake.

Associate the Complaint Intake OmniScript to an Action Launcher Deployment

The FSCComplaint/Intake OmniScript guides users in capturing a customer complaint.

Complaint Intake OmniScript Components

You can customize the Complaint Intake OmniScript to suit your business needs.

Configure the Public Complaint Object

To store the financial account of a customer who is raising a complaint, add a field to the Public Complaint object.

1. In Setup, go to **Object Manager**.

2. In the Quick Find box, enter `Public Complaint`, and then select **Public Complaint**.

3. In Fields & Relationships, click **New**.

4. For the field type, select **Lookup Relationship** and click **Next**.

5. From the Related To dropdown menu, select **Financial Account** and click **Next**.

6. For Field Label, enter `Financial Account` and click **Next**.

7. Save your changes.

Assign Complaint Management Permissions to Users

To use the complaint intake process, assign relevant permissions to your users.

1. Assign permission sets.

    a. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.

    b. Click a user's name.

    c. In Permission Set Assignments, click **Edit Assignments**.

    d. From Available Permission Sets, select and add OmniStudio User, Financial Services Cloud Basic, or Financial Services Cloud Standard, or Financial Services Cloud Extension permission sets.

    e. Save your changes.

2. Set field-level security for the Case object.

    a. In Setup, go to **Object Manager**.

    b. In the Quick Find box, enter `Case`, and select **Case**.

    c. Select **Fields & Relationships**.

    d. Select **Case Source**.

    e. Click **Set Field-Level Security**.

    f. For the profiles using the complaint intake process, select **Visible** and deselect **Read-Only**.

    g. Save your changes.

3. Similarly, set the field-level security for these fields on the Public Complaint object.

Field
Account
Cause Subtype
Cause Type
Compensation Amount
Complainant Authorized
Complaint Case
Description
Escalation Cause
Financial Account
Incident Date
Include In Regulatory Report
Priority
Product Type
Received Date

Available in: Lightning Experience

Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

    AND

    View Setup and Configuration

To set field-level security:
- Manage Profiles and Permission Sets

    AND

    Customize Application

Field
Source Type
Status
Subject
Subtype
Type

4. Similarly, set the field-level security for these fields on the Case Participant object.

Field
Authorization Proof
Case
Created By
Last Modified By
Last Modified Date
Name
Participant
Preferred Communication Mode
Preferred Contact End Time
Preferred Contact Start Time
Role
Status

5. Assign object permissions.

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

  b. Click the profile that you're editing, and click **Edit**.

  c. Under Standard Object Permissions, locate the Public Complaint object and assign the Read, Create, Edit, and View All permissions.

  d. Repeat these steps for the Case Participant and Document Checklist Items objects.

  e. Under Custom Object Permissions, locate the Contact-Contact Relation object and assign the Create and Read permissions.

  f. Save your changes.

  g. Repeat these steps for other profiles that are relevant for complaint intake or fulfillment.

Add Complaint Status Picklist Values

To indicate the status of a complaint, activate the picklist values.

1. In Setup, go to Object Manager.

2. In the Quick Find box, enter *Case*, and then select **Case**.

3. In Fields & Relationships, select the **Status** field.

4. In the Inactive Values section, activate the **Pending**, **In Review**, and **Submitted** picklist values.

5. Repeat these steps for the Status field picklist values on the Public Complaint object.

Add Related Lists to the Case Page Layout

When a complaint is submitted, a case record and the associated public complaint and case participant records are created. To track and monitor complaints, add these records as related lists to the Case page layout.

1. In Setup, go to Object Manager.

2. Select the **Case** object.

3. In Page Layouts, click **Case Layout**.

4. From the Case Layout menu, select **Related Lists**.

5. Drag **Public Complaint**, **Case Participant**, and **Document Checklist Items** to the related lists section of the page.

6. Save your changes.

SEE ALSO:

Customize Page Layouts with the Enhanced Page Layout Editor

Add Fields to the Public Complaint Page Layout

Add the fields that are required for complaint intake.

1. In Setup, go to Object Manager.

2. In the Quick Find box, search for `Public Complaint`, and then select **Public Complaint**.

3. In the Page Layouts section, click **Public Complaint Layout**.

4. From the Public Complaint Layout menu, select **Fields**.

5. Drag **Product Type**, **Received Date**, **Is Complainant Authorized**, **Source Type**, **Escalation Cause**, **Include In Regulatory Report**, **Cause Type**, **Cause Subtype**, and **Compensation Amount** to the public complaint details section.

6. Save your changes.

SEE ALSO:

Customize Page Layouts with the Enhanced Page Layout Editor

Associate the Complaint Intake OmniScript to an Action Launcher Deployment

The FSCComplaint/Intake OmniScript guides users in capturing a customer complaint.

1. Clone the OmniScript.

   a. From the App Launcher, find and select **OmniStudio**.

   b. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

   It can take a little time for the OmniScripts app to open.

   c. Select **FSCComplaint/Intake** and open the highest version of the OmniScript.

   d. To clone the OmniScript, click **New Version**.

   e. Click **Activate Version**.

2. Configure an action launcher deployment for the OmniScript.

   Give your users quick access to the complaint intake form (OmniScript). If you have an existing action launcher deployment, add the complaint intake form to it.

   a. From Setup, in the Quick Find box, enter `Action Launcher`, and select **Action Launcher**.

   b. Click **New Deployment**, and give it a name.

   c. In Guidance to Show, select **OmniScripts**.

   d. In the Available Objects list, move **Account** to Selected Objects.

   The selected objects determine the objects where you can show the complaint intake form.

   e. In Select actions to add, select **/FSCComplaint/Intake/Multi-Language**.

   f. Next to the OmniScript, click the add icon.

   g. Save your changes.

3. Add the OmniScript to the Person Account page.

   a. In Setup, go to Object Manager.

b. In the Quick Find box, enter `Account`, and then select **Account**.

c. Click **Lightning Record Pages** and select **Account Record Page**.

d. Click **Edit**.

e. In the Lightning App Builder, drag the **Action Launcher** component onto the record page.

f. In the properties pane, select the action launcher deployment that contains the complaint intake OmniScript.

g. Save your changes.

SEE ALSO:

Create an Action Launcher Deployment

Complaint Intake OmniScript Components

You can customize the Complaint Intake OmniScript to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetAccountContext	Integration procedure action	Retrieves the customer community user's Account Id from Salesforce when the user logs in to a self-service portal and launches the complaint intake process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable. To let your customer community users use the complaint intake process on a self-service portal, the FSCComplaint/Intake OmniScript must include the SetAccountContext component.	ComplaintManagement_SetAccountContext integration procedure
GetComplaintsWithCaseNumber	integration procedure action	Retrieves the list of existing complaints associated with the Person Account.	ComplaintManagement_GetComplaints integration procedure

Component Name	Component Type	What It Does	What It Calls
PastComplaintsCount	Set values	Retrieves the number of past complaints associated with the Person Account.	None
getCustomerInformation	DataRaptor extract action	Retrieves the Person Account details.	FSCComplaintManagementGetCustomerInformation data raptor
PastComplaints	Step	Prompts the user to review existing complaints and presents a New Complaint button to register a new complaint.	None
GetRelatedContacts	DataRaptor extract action	Retrieves the list of related contacts associated with the person account.	ComplaintManagement_GetRelatedContacts integration procedure
GetAllAvailableRoles	DataRaptor extract action	Retrieves the list of available roles in your Salesforce org.	FSCComplaintManagementGetReciprocalRoles
ComplainantIdentification	Step	Prompts the user to provide complainant details.	None
ValidateTimeRange	Remote action	Checks to see if the start and end times to contact the complainant is valid.	ComplaintMgmtHelper class, validateTimeRange method
IsAuthorised	Set values	Checks to see if the complainant is authorized to raise a complaint.	None
IsValidContactSelected	Set values	Checks to see if a valid account is selected or created when someone else is raising a complaint on a customer's behalf.	None
SetErrorForAuthorization	Set errors	Displays an error message if the complainant isn't authorized.	None
SetErrorForSelectedContact	Set errors	Displays an error message if the contact isn't selected or created when submitting a complaint.	None
SetErrorForTimeRange	Set errors	Displays an error if the start time to contact a complainant is after the end time.	None
GetAllFinancialAccounts	Integration procedure action	Retrieves all the financial accounts related to the customer.	ComplaintManagement_GetFinancialAccounts

Component Name	Component Type	What It Does	What It Calls
ComplaintDetails	Remote action	Converts the uploaded documents in a format needed to be displayed in the summary.	ComplaintMgmtHelper class, ConvertUploadedDocuments method
SetValuesForSummary	Set values	Sets the summary values to use.	None
Summary	Step	Displays the complaint and complainant details, and presents a Submit button for the user to confirm the complaint.	None
CallConnectApiFromApex	Remote action	Creates a case record, a public complaint record, and case participant records for the submitted complaint.	ComplaintMgmtHelper class, callCreateComplaintApi method
SetConnectApiResponse	Set values	Sets the variables for interpreting the Connect API response.	None
SetCaseUrl	Set values	Sets the case URL for the submitted complaint.	None
DeleteAssessmentIfError	Remote action	Deletes the assessment record when the Connect API call is unsuccessful.	AssessmentHelperFunction class, deleteAssessmentResponses method
Confirmation	Step	Displays complaint status and presents a case URL for the user if the complaint was submitted.	None

Submit a Customer Complaint

Your service agents can capture and submit a customer complaint through the complaint intake OmniScript. A case is then created in Salesforce.

1. On the customer's Person Account record page, in the action launcher, click **Manage Complaints**.

   If the Person Account has past complaints, they're listed. Review the complaints before adding a new one.

2. Add the complainant details.

   a. Select the preferred communication mode.

      If the customer isn't the complainant, then check if the complainant has a related account or contact. If an account or contact exists, select it. If not, create an account for the complainant.

   b. Click **Next**.

3. Add the complaint details.

   a. Select the product or service for which the customer has raised a complaint.

      If the product or service is associated with a financial account, you can select the appropriate financial account.

   b. For Complaint Type, select a category to which the complaint belongs.

      The values in the Complaint Type dropdown are based on the product or service that's selected.

   c. For Complaint SubType, select a subcategory to which the complaint belongs.

      The values in the Complaint SubType dropdown are based on the Complaint Type.

   d. Upload any supporting documents related to the complaint and click **Next**.

4. Review the information and click **Submit**.
   A case is created in Salesforce for the submitted complaint.

EDITIONS

Available in: Lightning Experience

Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled

USER PERMISSIONS

To submit a complaint
- OmniStudio User

  AND

  Read and View All permissions for Omni Processes object

  AND

  Financial Services Cloud Basic

  OR

  Financial Services Cloud Standard

  OR

  Financial Services Cloud Extension

Enable Complaint Intake Process in a Self-Service Portal

Let your customer community users launch the complaint intake process directly from a self-service portal, such as the Financial Services Client Portal.

Set Up Complaint Intake Process on Financial Services Client Portal
Let your customer community users file complaints on a Financial Services Client Portal.

Submit a Customer Complaint on Financial Services Client Portal
Complete the complaint intake form to submit your complaint about a product or a service.

EDITIONS

Available in: Lightning Experience

Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled

Set Up Complaint Intake Process on Financial Services Client Portal

Let your customer community users file complaints on a Financial Services Client Portal.

Create a Customer Community User Profile

To control access to Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

Configure the Financial Services Client Portal

Give your customers access to the Financial Services Client Portal to file complaints.

Assign Permission Sets to Portal Users

To let your customers access the complaint intake process on the Financial Services Client Portal, create and assign relevant user permissions.

Configure Field-Level Security

Give your customers access to the appropriate fields that they need for using the complaint intake process.

Set Up Sharing Sets

Give your Financial Services Client Portal users access to records using sharing sets. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

Set Up Sharing Rules

Use sharing rules to extend sharing access to your portal users. Sharing rules give portal users greater access by making automatic exceptions to your org-wide sharing settings. Add sharing rules to give your portal users access to relevant records that they need when submitting a complaint.

Make the Complaint Intake Process Visible to Your Portal Users

Let your customers launch the complaint intake process on the Financial Services Client Portal.

Create a Customer Community User Profile

To control access to Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

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

2. Locate the user profile that maps to your customer community license, and click **Clone**.

3. Enter a name for the cloned profile, for example, `Banking Customer Community User`, and save your changes.

4. On the Profile Edit page, click **Edit**.

5. Configure these object permissions.

Object	Access level
Decision Matrices	Read
Decision Matrix Columns	Read
Decision Matrix Rows	Read
Decision Matrix Versions	Read
Expression Sets	Read

Object	Access level
Expression Set Steps	Read
Expression Set Step Relationships	Read
Expression Set Variables	Read
Expression Set Versions	Read
Omni Data Transformation	Read
Omni Data Transformation Item	Read
Omni Electronic Signature Template	Read
Omni Process	Read
Omni Process Compilation	Read
Omni Process Element	Read
Omni Process Transient Data	Read
Omni UI Card	Read
Financial Account	Read
Document checklist Items	Read
Public Complaint	Read and Create

6. Save your changes.

Configure the Financial Services Client Portal

Give your customers access to the Financial Services Client Portal to file complaints.

Before you can create the Financial Services Client Portal for your customers, enable Digital Experiences in your Salesforce org.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.

2. Click **New**, and select the Financial Services Client Portal template.

3. Click **Get Started**.

4. Enter a site name.

5. For the URL, enter the name of your site.

   This name is appended to the domain that you created when you enabled Digital Experiences. For example, if your site's domain name is `fscna45.my.site.com` and you're creating a bank site, you can enter `MyBank` to create the URL `fscna45.my.site.com/MyBank`.

6. Click **Create**.

7. Click **Administration**, and then under Settings, click **Activate**.

8. Under Members, from the Search dropdown, select **Customer**.

9. From Available Profiles, select your cloned community user profile, and then click **Add**.

10. Save your changes.

SEE ALSO:

Enable Digital Experiences

Create an Experience Cloud Site

Create a Self-Service Financial Services Client Portal

Add Members to Your Experience Cloud Site

Create Experience Cloud Site Users

EDITIONS

Available in: Lightning Experience

Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled

USER PERMISSIONS

To create a Financial Services Client Portal:

- Create and Set Up Experiences AND View Setup and Configuration

To customize a Financial Services Client Portal:

- Be a member of the portal AND Create and Set Up Experiences

  OR

  Be a member of the portal AND View Setup and Configuration AND an experience admin, publisher, or builder in that portal

Assign Permission Sets to Portal Users

To let your customers access the complaint intake process on the Financial Services Client Portal, create and assign relevant user permissions.

1. Create a permission set.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

   b. Click **New**.

   c. Provide a name for the permission set, for example, `Runtime Access for Self-Service Process`.

   d. For License, select **OmniStudio Runtime for Communities**, and then save your changes.

   e. Under System, click **System Permissions**, and then click **Edit**.

   f. Select **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**, and then save your changes.

2. Assign permission sets.

   a. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.

   b. Click a user who's assigned one of the customer community profiles.

   c. In Permission Set Assignments, click **Edit Assignments**.

   d. From Available Permission Sets, select the permission set that you created and an appropriate user profile permission set.

   For example, if the customer user profile is Customer Community, select Financial Services For Customer Community permission set.

   e. Click **Add**.

   f. Save your changes.

Configure Field-Level Security

Give your customers access to the appropriate fields that they need for using the complaint intake process.

1. In Setup, go to Object Manager.

2. In the Quick Find box, enter `Case`, and select **Case**.

3. Select **Fields & Relationships**.

4. Select **Case Source**, and click **Set Field-Level Security**.

5. Select Visible for the profiles using the complaint intake process.

6. Deselect Read-Only for the profiles using the complaint intake process.

7. Save your changes.

8. Complete these steps for Account Name and Financial Account fields on the Case object.

Set Up Sharing Sets

Give your Financial Services Client Portal users access to records using sharing sets. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Settings**.

2. In the Sharing Sets related list, click **New** to create a sharing set.

3. Enter a label for the sharing set.

4. In the Select Profiles section, select your cloned community user profile and click **Add**.

5. Under **Select Objects**, select Account-Account Relationship, Case, Financial Account, Public Complaint, and User objects and click **Add**.

6. In the Configure Access section, configure access for the selected profile and objects.

   a. Next to Account-Account Relationship, click **Set Up**.

   b. For User, select **Account**, for Target Account-Account Relationship, select **Owner.Account**, and for Access Level, select **Read Only**.

   c. Click **Update**.

   d. Next to Case, click **Set Up**.

   e. For User, select **Account**, for Target Case, select **Owner.Account**, and for Access Level, select **Read/Write**.

   f. Click **Update**.

   g. Next to Financial Account, click **Set Up**.

   h. For User, select **Account**, for Target Financial Account, select **FinServ__PrimaryOwner__c**, and for Access Level, select **Read Only**.

   i. Click **Update**.

   j. Next to Public Complaint, click **Set Up**.

   k. For User, select **Account**, for Target Public Complaint, select **Account**, and for Access Level, select **Read Only**.

   l. Click **Update**.

   m. Next to User, click **Set Up**.

   n. For User, select **Account**, for Target User, select **Account**, and for Access Level, select **Read Only**.

   o. Click **Update**.

7. Save your changes.

   📝 Note: When a customer community user launches the complaint intake process from the Financial Services Client Portal, only the accounts and financial accounts for which the user is a primary owner are shown.

SEE ALSO:

Set Up Sharing Rules

Use sharing rules to extend sharing access to your portal users. Sharing rules give portal users greater access by making automatic exceptions to your org-wide sharing settings. Add sharing rules to give your portal users access to relevant records that they need when submitting a complaint.

To let your portal users access the complaint intake OmniScript, set up sharing rules for the Omni Process object.

1. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

2. Under Sharing Rules, next to the Omni Process Sharing Rules, click **New**.

3. Enter the label name and rule name.

4. For the rule type, select **Based on Criteria** to specify the field, operator, and value criteria that records must match to be included in the sharing rule.

5. For Field, select **Type**, for Operator, select **Equals**, and for Value, enter `FSCComplaint`.

6. For Share with, select **Public Groups** from the first dropdown list and **All Customer Portal Users** from the second dropdown list.

7. For Access Level, select **Read Only**.

8. Save your changes.

SEE ALSO:

   Create Criteria-Based Sharing Rules

Make the Complaint Intake Process Visible to Your Portal Users

Let your customers launch the complaint intake process on the Financial Services Client Portal.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your Financial Services Client Portal site, click **Builder**.

3. Create a custom page on the portal where you want to show the Complaint Intake process.

    a. From the Pages menu on the top toolbar, click **New Page** and select **Standard Page**.

    b. Select the page layout, and click **Next**.

    c. Enter a name for the page, for example, `Complaint Intake`.

    d. Click **Create**.

4. Add the custom page to navigation menu.

    a. Click any of the navigation pages at the top of the portal.

    b. In the Theme Navigation Menu properties pane, click **Edit Default Navigation**.

    c. Click **Add Menu Item**.

    d. Enter a name for the menu item, for example, `Raise a Complaint.`

    e. For Type, select **Site Page**, and for Page, select the name of the page you created.

    f. Save your changes.

5. Add the OmniScript component.

    a. Click the components icon to open the Components panel.

    b. In the Search box, find and drag the **OmniScript** component onto to an editable area of the page.

    c. In the OmniScript properties pane, for Type, select **FSCComplaint**, and for SubType, select **Intake**.

6. Preview and publish your changes.

You receive an email when your changes go live.

SEE ALSO:

Customize Sites with Experience Builder

Work with the FSC Portal Home Page

Edit Pages and Components in Experience Builder

How do external Experience Cloud site members get login information?

Submit a Customer Complaint on Financial Services Client Portal

Complete the complaint intake form to submit your complaint about a product or a service.

1. Log in to the Financial Services Client Portal.

2. To launch the complaint intake form, find and select the complaint intake page or action on the portal.

   If your account has past complaints, they're listed. Review the complaints before adding a new one.

3. Select the preferred communication mode and click **Next**.

4. Add the complaint details.

   a. Select the product or service for which you want to raise a complaint.

   If the product or service is associated with a financial account, you can select the appropriate financial account.

   Note: Only the financial accounts for which the community user is a primary owner are shown.

   b. For Complaint Type, select a category to which the complaint belongs.

   The values in the Complaint Type dropdown are based on the product or service that's selected.

   c. For Complaint SubType, select a subcategory to which the complaint belongs.

   The values in the Complaint SubType dropdown are based on the Complaint Type.

   d. Upload any supporting documents related to the complaint and click **Next**.

5. Review the information and click **Submit**.

   A case is created in Salesforce for the submitted complaint. To view the case details, go to the Cases page on the portal.

CRM Analytics for Complaint Management

The CRM Analytics app for Complaint Management gives your customer experience managers and complaint team managers quick insights on customer complaints.

Enable CRM Analytics for Complaint Management
Before you create the CRM Analytics app for Complaint Management, enable CRM Analytics in your Salesforce org.

Assign Permissions for CRM Analytics App for Complaint Management
Enable users to create, edit, and view the CRM Analytics app for Complaint Management by assigning the relevant permissions.

Launch CRM Analytics App for Complaint Management
Access the Analytics app for Complaint Management from the public complaints list view.

Enable CRM Analytics for Complaint Management

Before you create the CRM Analytics app for Complaint Management, enable CRM Analytics in your Salesforce org.

1. From Setup, in the Quick Find box, enter *Getting Started*, and then select **Getting Started** under Analytics.

2. Select **Enable CRM Analytics**.

   If you see the Launch CRM Analytics button, CRM Analytics is already enabled.

Assign Permissions for CRM Analytics App for Complaint Management

Enable users to create, edit, and view the CRM Analytics app for Complaint Management by assigning the relevant permissions.

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

2. Click the profile that you're editing.

3. Click **Permission Set Assignments**, and then click **Edit Assignments**.

4. Select the RI for Fins Admin permission set.

   📝 Note: You can see the RI for Fins Admin permission set only if you've enabled the RevenueIntelligenceFins license in your org.

5. Click **Add**, and then click **Save**.

6. Repeat these steps for all users who create, edit, and view the Analytics app for Complaint Management.

Launch CRM Analytics App for Complaint Management

Access the Analytics app for Complaint Management from the public complaints list view.

1. From the App Launcher, find and select **Public Complaints**.
2. In the Public Complaints list view, click **Complaint Intelligence**.

SEE ALSO:

    Complaint Management Dashboard

    Complaints Intelligence Dashboard

Compliant Data Sharing for Financial Services

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

User Permissions Needed	
To configure Compliant Data Sharing in Financial Services Cloud:	Financial Services Cloud Extension Permission Set
	WITH
	Configure Compliant Data Sharing System Permission

SEE ALSO:

    Salesforce Help: Compliant Data Sharing

Data Consumption Framework

With Data Consumption Framework, your agents can access complete and current data from external systems without leaving Salesforce. The framework extends the Continuations framework in FlexCards and OmniScripts by providing them with integration definition capabilities for better real-time performance. In addition, agents can use the framework to initiate asynchronous flows that call APIs at scale to support more simultaneous users.

Integration Orchestration (Pilot)

Integration Orchestration is a framework that helps you create integrations and execute them. Integration Orchestration employs advanced decision-making processes by using context service with Business Rules Engine to generate the integration plan.

SEE ALSO:

Data Consumption Framework

Integration Orchestration (Pilot)

Integration Orchestration is a framework that helps you create integrations and execute them. Integration Orchestration employs advanced decision-making processes by using context service with Business Rules Engine to generate the integration plan.

📝 **Note:** This feature isn't generally available and is being piloted with certain Customers subject to additional terms and conditions. It isn't part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time at Salesforce's sole discretion, and Salesforce may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an as-is basis and use of this feature is at your sole risk. To participate in this pilot, contact your account executive.

Before You Begin

Before you set up your Salesforce org for integration orchestration (pilot), configure these settings.

Set Up Integration Orchestration (Pilot)

In the process of loan orientation and onboarding, financial institutions must gather information from different outside systems using integrations. For example, integrations for identity verification and AML screening. To decide which integrations to use depends on the information provided in the application and the type of financial product.

Before You Begin

Before you set up your Salesforce org for integration orchestration (pilot), configure these settings.

- Turn on the Know Your Customer setting. See Enable Know Your Customer.
- Turn on the OmniStudio Metadata setting.
- Turn off the OmniStudio Managed Package Runtime setting.
- Sign up for the Integration Orchestration pilot.

Set Up Integration Orchestration (Pilot)

In the process of loan orientation and onboarding, financial institutions must gather information from different outside systems using integrations. For example, integrations for identity verification and AML screening. To decide which integrations to use depends on the information provided in the application and the type of financial product.

Integration Orchestration employs advanced decision-making processes using context service with Business Rules Engine to generate the integration plan. Use the invocable actions in the flow to generate an integration plan and run the plan. Review the status of the integration callouts and track integrations by using the Integration Provider Execution Status Lightning Web Component.
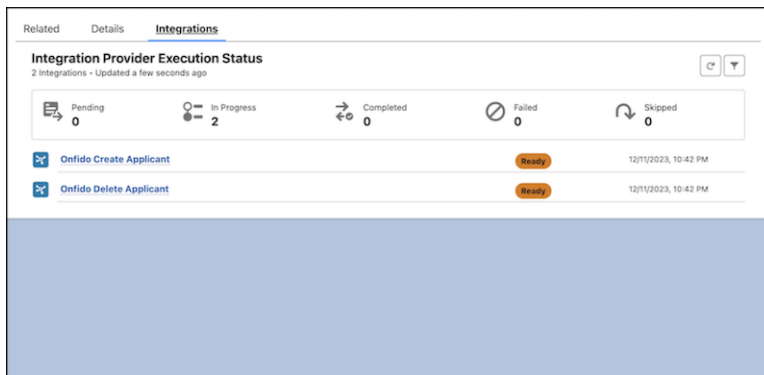
Prepare Integration Procedures and DataRaptors

As a prerequisite to setting up integration definitions, create the DataRaptor and the relevant integration procedures to define the integration.

Create Integration Definitions

An integration definition is a framework to set up integrations with different external endpoints quickly and efficiently.

Create and Map Context Definitions

In Integration Orchestration (Pilot), the context service is used to get the hydrated data from the Application Form, Application Form Product, and Applicant objects. The data from the context service is then mapped as inputs to the decision table.

Create a Decision Table and an Expression Set

Capture all scenarios required for the decisioning of a loan application.

Build a Flow with Invocable Actions

Create an integration plan and execute the plan by building a flow.

Prepare Integration Procedures and DataRaptors

As a prerequisite to setting up integration definitions, create the DataRaptor and the relevant integration procedures to define the integration.

To integrate identity verification systems, create a DataRaptor Extract as an input to the API callout and create an integration procedure by using the DataRaptor. To handle the response from the API callout, create a DataRaptor Load and another Integration Procedure.

SEE ALSO:

Salesforce Help: Create an Integration Procedure

Create Integration Definitions

An integration definition is a framework to set up integrations with different external endpoints quickly and efficiently.

You can call the integration definition from an invocable action within a flow or from an integration procedure in an OmniScript. You can use an integration definition in an invocable action within a Salesforce Flow or from an integration procedure in an OmniScript or FlexCard

1. In Setup, in the Quick Find box, enter `Integration Definitions`, and then select Integration Definitions.

2. Click **New**.

3. From the Type list, select the integration type.

   • **Apex Defined:** This approach gives you greater control over the API call out. The endpoint configuration and the input and output processors are handled in an Apex class.

   • **External Services Defined:** A low-code, declarative approach to connect Salesforce with an external endpoint. You can define the input processor that prepares the input to the external service and the output processor to handle the response from the external service. The input and output processors are integration procedures.

   • **Java Defined:** This approach gives greater control over the API callout. In a Java-defined integration, the end-point configuration, the input configuration, and the output configuration are handled in a Java class.

   🛑 Important: For the Integration Orchestration (Pilot), use the External Services Defined integration type.

4. Enter the integration definition name, developer name, and description.

5. Click **Next**.

6. For the External Services Defined integration type, enter this information:

   a. Search for the registered external service that you want to use to connect to an external API.

   b. For Input Processor, select the integration procedure that you want to use to format the input for the selected external service.

   c. For Output Processor, select the integration procedure that you want to use to handle the response from the external service.

   d. Enable Integration Orchestrator.

   e. Save your changes.

EDITIONS

Available in Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions

USER PERMISSIONS

To create Apex Defined integration definitions:
• Customize Application
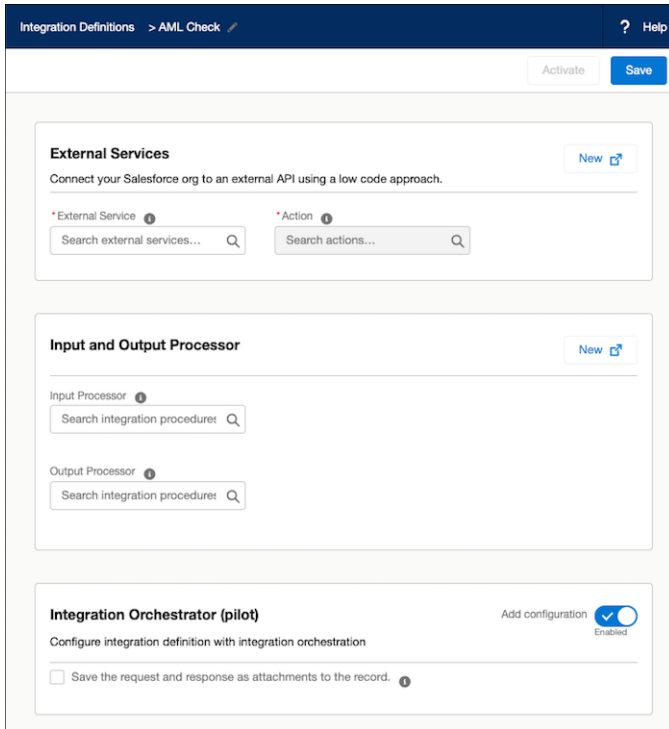
7. From the integration definition's quick action menu, click **Activate**.

8. Save and activate the integration definition.

Create and Map Context Definitions

In Integration Orchestration (Pilot), the context service is used to get the hydrated data from the Application Form, Application Form Product, and Applicant objects. The data from the context service is then mapped as inputs to the decision table.

Context Service defines the relationship between the nodes and the attributes within each node. By using nodes and attributes, your users can easily access relevant data from the mapped data source.

1. Create the context definition for an Application Form as the root node, and add the Name and Stage attributes.

   For more information on how to create a context definition, see Create Context Definitions.

2. Create child nodes for Applicant and ApplicationFormProduct with the relevant attributes.

   For more information on how to create a context definition, see Create Context Definitions.

3. Map the attributes as inputs for the decision table.
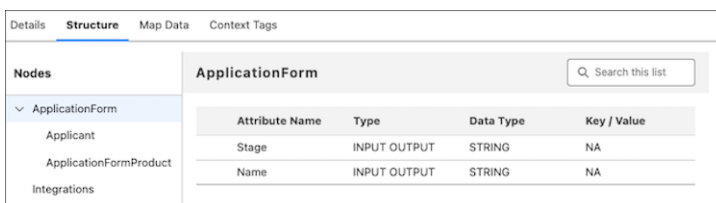
4. Create an Integrations node to be used by BRE to write back to the context.

USER PERMISSIONS

To create context definitions:
- Context Service Admin

Create a context definition for an Integration with these attributes: RunAsUser, IntegrationId, RelatedObject, Status, and Id. The attributes under Integrations are fixed and are mapped as output to the decision table.

5. Map the attributes of the context definition to the sObjects. For example, in Integration Orchestration, map the attributes with the Integration Provider Decision Requirement object as shown in the image.
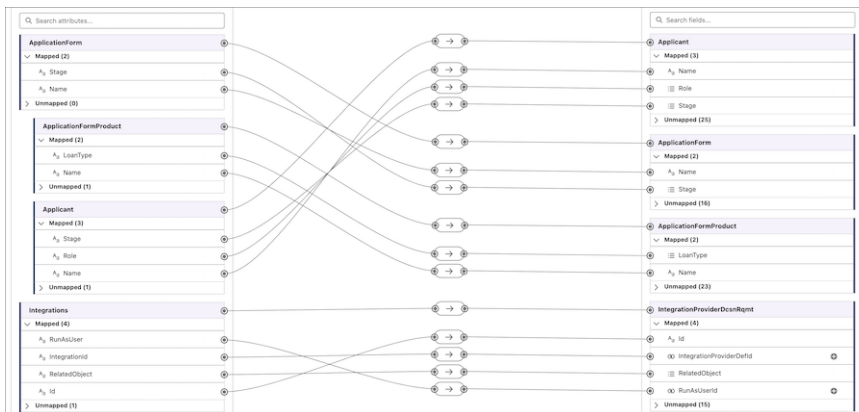
After the fields are mapped, the data from the context service are used for the input and output parameters for the decision table.

SEE ALSO:

Salesforce Help: Map Context Definitions

Create a Decision Table and an Expression Set

Capture all scenarios required for the decisioning of a loan application.

Create a Lookup table with Financial Services Cloud as the usage type and select Integration Provider Decision Requirement as the source object. Ensure to create relevant fields, which are the inputs to the lookup table by using Integration Provider Decision Requirement as the source. The fields must be defined in the context service.

The outputs for the lookup table are fixed. Add these fields as output: RunAsUser, RelatedObjectId, and IntegrationProviderDefId.

Design the expression set with Financial Services Cloud as the usage type. Select the Context Definition created. Use the prebuilt Integration Orchestration custom element in the expression set to create the business rules.

Ensure that the attributes created in the context definition are mapped in the input and output parameters. After the expression set is activated, integrations are generated based on the decision table.

SEE ALSO:

    Salesforce Help: Business Rules Engine

Build a Flow with Invocable Actions

Create an integration plan and execute the plan by building flow.

Use these invocable actions in the provided sequence to build a Flow to run the logic:

1. Build a context service invocable action to map context definition ID and context mapping ID with the hydration source in the JSON format.

2. Create an Integration Plan.

3. Run the Integration Plan.

SEE ALSO:

    Salesforce Help: Invoke a Build Context in a Flow

Discovery Framework

With the Discovery Framework, your users can create digital forms to collect and validate data and avoid time-consuming and error-prone manual methods. The Discovery Framework data model and the power of OmniStudio enable your users to create digital forms and manage every aspect of questionnaire-driven data collection in compliance with your policies.

> **Note:** Discovery Framework is compatible with only OmniStudio standard objects model (OmniStudio Spring '22 and later releases). Each OmniStudio release has a unique link for downloading its managed package, plus Release Notes, installation instructions, and upgrade instructions. For a new installation, your first task is to Prepare to Install the OmniStudio Package. For an upgrade, your first task is to Install or Upgrade the OmniStudio Package. After you install or upgrade, make sure that you have disabled OmniStudio Managed Package Runtime and enabled OmniStudio Metadata (for import and export) settings.

SEE ALSO:

> *Salesforce Help*: Set Up and Configure Discovery Framework

Document Generation

With Document Generation, you can generate contracts, proposals, quotes, reports, non-disclosure agreements, service agreements, and more.

SEE ALSO:

> *Salesforce Help*: Document Generation

EDITIONS

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

Document Checklist Items in Financial Services Cloud

Manage your document approval process in Financial Services Cloud. Define document types for commonly required documentation. Then create a document checklist item for each file required from a customer. A customer or user then uploads a relevant file for the document checklist item, and the files are tracked through your approval process. Customers can track the progress of their uploaded documentation from submission to approval.

> **Note:** Approval Processes and Communities aren't supported in Professional Edition.

SEE ALSO:

> Document Tracking and Approvals

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Engagement

Use the engagement data model to store details about an engagement between a customer and a service agent.

SEE ALSO:

> *Salesforce Help*: Engagement

EDITIONS

Available in: Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** Editions where the Financial Services Cloud license is enabled.

Events and Milestones

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

> **Note:** Event Type and Milestone picklist values are in English, but you can translate them using the Translation Workbench.

Add the Events and Milestones Component to a Record Page

To make the list of events or milestones available on a record page, add the Person Life Events or Business Milestones related list to the corresponding page layout. Then, add the Events or Business Milestones component to a person account, account, or contact record page.

Work with Events and Milestones

You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive event types and milestone types, create contextual actions for events and milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and milestones. Plus, you can choose the details your users see when they hover over an event or milestone.

Add the Events and Milestones Component to a Record Page

To make the list of events or milestones available on a record page, add the Person Life Events or Business Milestones related list to the corresponding page layout. Then, add the Events or Business Milestones component to a person account, account, or contact record page.

> ✏️ **Note:** If you've disabled Chatter, then to use the Events and Milestone Component, give users access to Salesforce CRM Content by assigning feature licenses. To assign feature licenses to users automatically, from Setup, enter `Salesforce CRM Content` in the Quick Find box, select **Salesforce CRM Content**, and then select **Autoassign feature licenses to existing and new users**.

1. Add the Business Milestones related list to the Account page layout. Add the Person Life Events related list to the Person Account and Contact page layouts.

   a. From Setup, open **Object Manager**.

   b. In the Quick Find box, enter `Account`, and then select **Account**.

   c. Click **Page Layouts**, and then select the relevant page layout.

   d. On the palette, select **Related Lists**.

   e. Drag **Business Milestones** from the palette to the Related Lists section on the page and click **Save**. If you're prompted to overwrite user's related list customizations, click **Yes**.

   f. Similarly, add the Person Life Events related list to the relevant page layouts for Person Account and Contact objects.

      > ✏️ **Note:** The Person Life Events related list is available only when person account is enabled in your org.

2. Add the Events and Milestones component to a person account, account, or contact record page.

   a. On the record page you want to add the component to, from Setup, select **Edit Page**.

   b. Drag the Events and Milestones component to the page.

   c. Save your changes.

Work with Events and Milestones

You can create event types and milestone types, activate or deactivate them, and make them unique. You can hide sensitive event types and milestone types, create contextual actions for events and milestones, and expire events or milestones that are no longer valid. You can change the default icons that represent the event types and milestones. Plus, you can choose the details your users see when they hover over an event or milestone.

If the provided event types or milestone types don't address your business needs, you can create additional types.

You can deactivate event types or milestone types that aren't relevant.

Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

When you hover over an event or business milestone, an expanded lookup card displays the key fields from the event or milestone record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

Hide life event types or milestone types that can cause customer resentment if the customer hasn't yet achieved or isn't likely to ever achieve an event or milestone of that type. When you hide an event or milestone type, it doesn't appear on the component until you add an event or milestone of that type.

Agents can quickly create a record and associate it with an event or milestone without leaving the page they're on. For example, when viewing a car purchase event, the agent can quickly create an opportunity for selling an auto insurance policy. The Opportunity record is automatically associated with the life event. Create relevant actions for events and milestones. Add the actions to the appropriate page layouts so that they appear in the expanded lookup card when an agent hovers over an event or milestone.

Expire the events or milestones that are no longer valid. For example, expire a car purchase event after the client has sold the car.

You can change the default icon associated with an event type or milestone type. Upload an SVG file to replace the icon.

Create Event or Milestone Types

If the provided event types or milestone types don't address your business needs, you can create additional types.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Person Life Event`, and then select **Person Life Event**.

> 📝 **Note:** To create milestone types, select **Business Milestone**.

3. Click **Fields & Relationships**, and then select **Event Type** or **Milestone Type**.

4. Under Event Type Picklist Values or Milestone Type Picklist Values, click **New**, and then add the new event types or milestone types.

5. Save your changes.

> 📝 **Note:** If your org uses the Translation Workbench, notify your translators when you add or change picklist values.
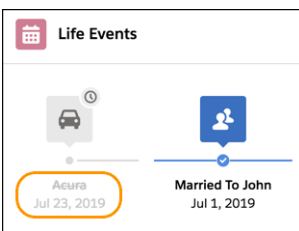
EDITIONS

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

Add or Remove Event or Milestone Types

You can deactivate event types or milestone types that aren't relevant.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter *Person Life Event*, and then select **Person Life Event**.

   ✎ Note: To deactivate milestone types, select **Business Milestone**.

3. Click **Fields & Relationships**, and then select **Event Type** or **Milestone Type**.
4. Under Event Type Picklist Values or Milestone Type Picklist Values, click **Deactivate** next to the value that you want to deactivate.

   To activate an inactive event type or milestone type, under Inactive Values, click **Activate** next to the value.

5. Save your changes.

Capture Once-in-a-Lifetime Events with Unique Event Types

Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter *Person Life Event*, and then select **Person Life Event**.

   ✎ Note: To mark milestone types unique, select **Business Milestone**.

3. Click **Fields & Relationships**, and then select **Event Type** or **Milestone Type**.
4. Under Event Type Picklist Values or Milestone Type Picklist Values, next to the value that you want to mark unique, click **Edit**, and select **Unique**.
5. Save your changes.

Choose the Event or Milestone Details to Show on Hover

When you hover over an event or business milestone, an expanded lookup card displays the key fields from the event or milestone record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

1. From Setup, open **Object Manager**.
2. Click **Person Life Event** or **Business Milestone**, and select **Compact Layouts**.
3. Clone the System Default layout, or click **New** to create a compact layout.
4. Enter a label for the compact layout, and add the fields to include.
5. Sort the fields in the order that you want them displayed by clicking **Up** or **Down**.

   💡 Tip: Put the object's Name field first to provide users context when they hover over an event or milestone.

6. Save the layout.
7. Click **Compact Layout Assignment**, and then click **Edit Assignment**.
8. From the Primary Compact Layout list, select your compact layout.
9. Save your changes.

Hide Sensitive Event Types and Milestone Types

Hide life event types or milestone types that can cause customer resentment if the customer hasn't yet achieved or isn't likely to ever achieve an event or milestone of that type. When you hide an event or milestone type, it doesn't appear on the component until you add an event or milestone of that type.

1. On a record page, from Setup, select **Edit Page**.

2. Click anywhere on the Life Events or Business Milestones component to select it.

3. In the Properties pane, depending on the record page you are on (person account, business account, or contact), click **Select** under Hide Event Types or Hide Milestone Types.

4. Select the event types or milestone types that you want to hide, and click **OK**.
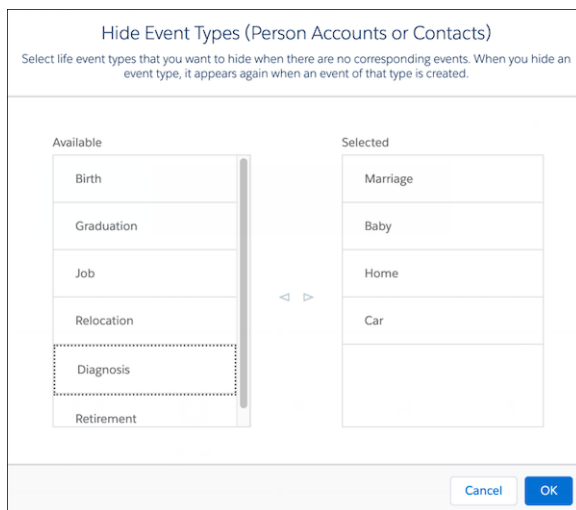
5. Save your changes.

Create and Configure Contextual Actions for Events and Milestones

Agents can quickly create a record and associate it with an event or milestone without leaving the page they're on. For example, when viewing a car purchase event, the agent can quickly create an opportunity for selling an auto insurance policy. The Opportunity record is automatically associated with the life event. Create relevant actions for events and milestones. Add the actions to the appropriate page layouts so that they appear in the expanded lookup card when an agent hovers over an event or milestone.

If Action Plans is enabled in your Salesforce org, the New Action Plan action is, by default, available for events and milestones. Create action plan templates for Person Life Event and Business Milestone objects. An agent can choose from these templates when creating an action plan from an event or milestone.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Person Life Event`, and then select **Person Life Event**.

   Note: To create actions for business milestones, select **Business Milestone**.

3. Click **Buttons, Links, and Actions**, and then click **New Action**.

4. In the Action Type list, select the type of action that you want to create. For example, select **Create a Record**.

5. In the Target Object list, select the type of object record this action creates, such as a contact or an opportunity.

6. Enter a label for the action. Users see this label as the name of the action.

7. Save your changes.

8. Click **Page Layouts**, and then select the appropriate page layout.

9. On the palette, select **Mobile & Lightning Actions**.

10. Drag the action to the Salesforce Mobile and Lightning Experience Actions section.

11. Save your changes.

Expire Obsolete Events or Milestones

Expire the events or milestones that are no longer valid. For example, expire a car purchase event after the client has sold the car.

1. Hover over an event type or milestone, and click the event or milestone that you want to expire.

2. On the Details tab, edit the record, and select **Expired**.

3. Click **Save**. The expired event or milestone appears crossed out.

Use Custom Icons for Event and Milestone Types

You can change the default icon associated with an event type or milestone type. Upload an SVG file to replace the icon.

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

2. Select **Events and Milestones**.

3. For the icon that you want to change, click ⏷, and select **Change Icon**.

4. Click **Upload Files**, and select the SVG file for the icon.

5. Save your changes.

Provide a Comprehensive View of Customer Financial Account Details

Using the FSCFinancialAccountsSummary component, service agents can view financial accounts, transactions, and record alerts associated with accounts in one place. The financial account details show information stored in Salesforce. The comprehensive view of financial account details helps agents to resolve customer queries quickly and efficiently.

To view financial account and financial account transaction details on the record pages for these accounts, assign OmniStudio permissions, and Financial Services Cloud Extension or the Financial Services Cloud Foundations permission set license to users, and customize the Lightning pages.

Assign a Permission Set License to Users

To access the FSCFinancialAccountsSummary component, assign the Financial Services Cloud
Extension or the Financial Services Cloud Foundations permission set license to users.

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

2. Make sure that one of these permission set licenses is assigned to the users:

   - Financial Services Cloud Extension

   - Financial Services Cloud Foundations

3. If a permission set isn't assigned, in the Permission Set Assignments related list:

   a. Click **Edit Assignments**.

   b. Add the permission set to Enabled Permission Sets.

   c. Save your changes.

SEE ALSO:

OmniStudio : OmniStudio Release Summary for Installation and Upgrade

EDITIONS

Available in: Lightning
Experience

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

USER PERMISSIONS

To use
FSCFinancialAccountsSummary,
OmniScript, DataRaptors,
FlexCards, and Integration
Procedures:

- Financial Services Cloud
  Extension OR Financial
  Services Cloud Foundations
  permission set

  AND

  OmniStudio User OR
  OmniStudio Admin
  permissions set

Assign OmniStudio Permissions to Users

Give users access to OmniStudio so that the users can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures.

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

2. Make sure that the OmniStudio Admin or OmniStudio User permission set is assigned to the users.

3. If a permission set isn't assigned to the users, in the Permission Set Assignments related list:

   a. Click **Edit Assignments**.

   b. Add the OmniStudio Admin or OmniStudio User permission set to Enabled Permission Sets.

   c. Save your changes.

SEE ALSO:

OmniStudio : OmniStudio Release Summary for Installation and Upgrade

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use FSCFinancialAccountsSummary, OmniScript, DataRaptors, FlexCards, and Integration Procedures:

- Financial Services Cloud Extension OR Financial Services Cloud Foundations permission set

  AND

  OmniStudio User OR OmniStudio Admin permissions set

Assign Permissions for Objects

Make sure that users have access to Financial Account, Financial Account Role, Financial Account
Transaction, and Record Alert objects. You can assign access to Advisor, Personal Banker, or custom
profiles.

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

2. Click **Edit** for the profile that you want to edit.

3. In the Custom Tab Settings, select tab visibility for these objects:

   - **Financial Accounts**
   - **Financial Account Transactions**
   - **Record Alerts**

4. Under Standard Object Permissions, for Record Alerts, select these access levels:

   - **Read**
   - **Create**
   - **Edit**
   - **Delete**
   - **View All**
   - **Modify All**

5. Under Custom Object Permissions, select these access levels for Financial Accounts, Financial
   Account Roles, and Financial Account Transactions:

   - **Read**
   - **Create**
   - **Edit**
   - **Delete**

6. Save your changes.

Customize Lightning Pages to View Financial Accounts and Transactions

Stay on top of your client's financial account details and transaction details by adding three components to record pages.

- Add the FSCFinancialAccountsSummary component to the Account record page.

- Add the FSCFinancialAccountDetails component to the Financial Account record page.

- Add the FSCFinancialAccountTransactionDetails component to the Financial Account record page.

1. To add the FSCFinancialAccountsSummary component to the Account record page:

   a. On the Account record page, go to Lightning App Builder.

   b. Drag Flexcard component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

   c. In the Properties pane, select **FSCFinancialAccountsSummary** component in the Flexcard Name field.
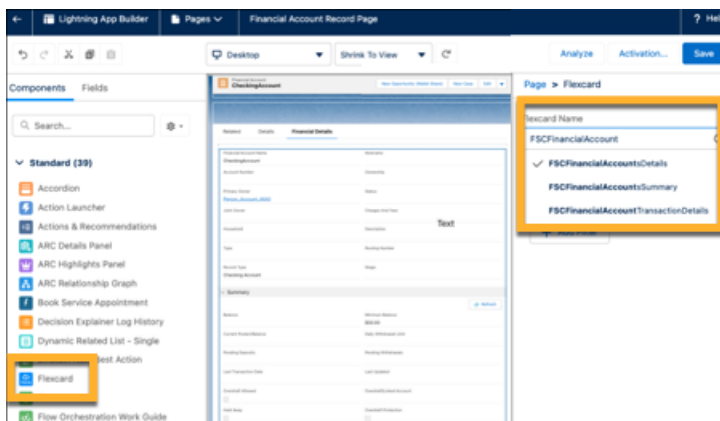
   d. Save your changes.

   e. If your page is new, activate the page.

2. To add the FSCFinancialAccountDetails and FSCFinancialAccountTransactionDetails components to the Financial Account record page:

   a. On the Financial Account record page, go to Lightning App Builder.

   b. Drag Flexcard component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

   c. In the Properties pane, select **FSCFinancialAccountDetails** component in the Flexcard Name field.

   d. Drag Flexcard component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

   e. In the Properties pane, select **FSCFinancialAccountTransactionsDetails** component in the Flexcard Name field.

   f. Save your changes.

g. If your page is new, activate the page.

SEE ALSO:

Salesforce Help: Create and Configure Lightning Experience Record Pages

View a Summary of Your Financial Account Details

View financial accounts, transactions, and record alerts associated with the financial accounts on
an account record page on the FSCFinancialAccountsSummary card.

1. From the App Launcher, select **Retail Banking Console.**

2. From the Retail Banking Console app menu, click **Accounts**.

3. Click the account whose financial account details you want to view.

4. On the FSCFinancialAccountsSummary card, view the financial account details:

   - Financial accounts

   - Financial account current balance and available balance

   - Record alerts

View Financial Account and Transaction Details

View financial account details and financial account transaction details associated with financial accounts on the FSCFinancialAccountDetails and FSCFinancialAccountTransactionDetails cards.

Before you begin:

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.

- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

- Preview and load all the child FlexCards of FSCFinancialAccountDetails and FSCFinancialAccountTransactionDetails FlexCards in the FlexCard designer. This is a one-time activity in your Salesforce org.

  For example, the FSCFinancialAccountDetails FlexCard contains FSCAutoLoanDetails child FlexCard. The FSCAutoLoanDetails contains FSCAutoLoanBasicDetails, FSCAutoloanSummary, and FSCStatementInformation child FlexCards. Preview and load all these child FlexCards to create Lightning Web Components, and then load the parent FlexCard.

1. In the App Launcher, select **Retail Banking Console**.

2. From the Retail Banking Console app menu, click **Financial Accounts**.

3. Click the financial account whose details you want to view.

4. On the FSCFinancialAccountDetails card, view the details for the selected financial account.

5. On the FSCFinancialAccountTransactionDetails card, view the transaction details for the selected financial account.

   🛑 Important: The FSCFinancialAccountTransactionDetails and FSCFinancialAccountsSummary flexcards show transaction details only when a transaction includes both the description and transaction type.

   a. On the card, get a quick view of recent transactions, description, date, and the amount of the transaction.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

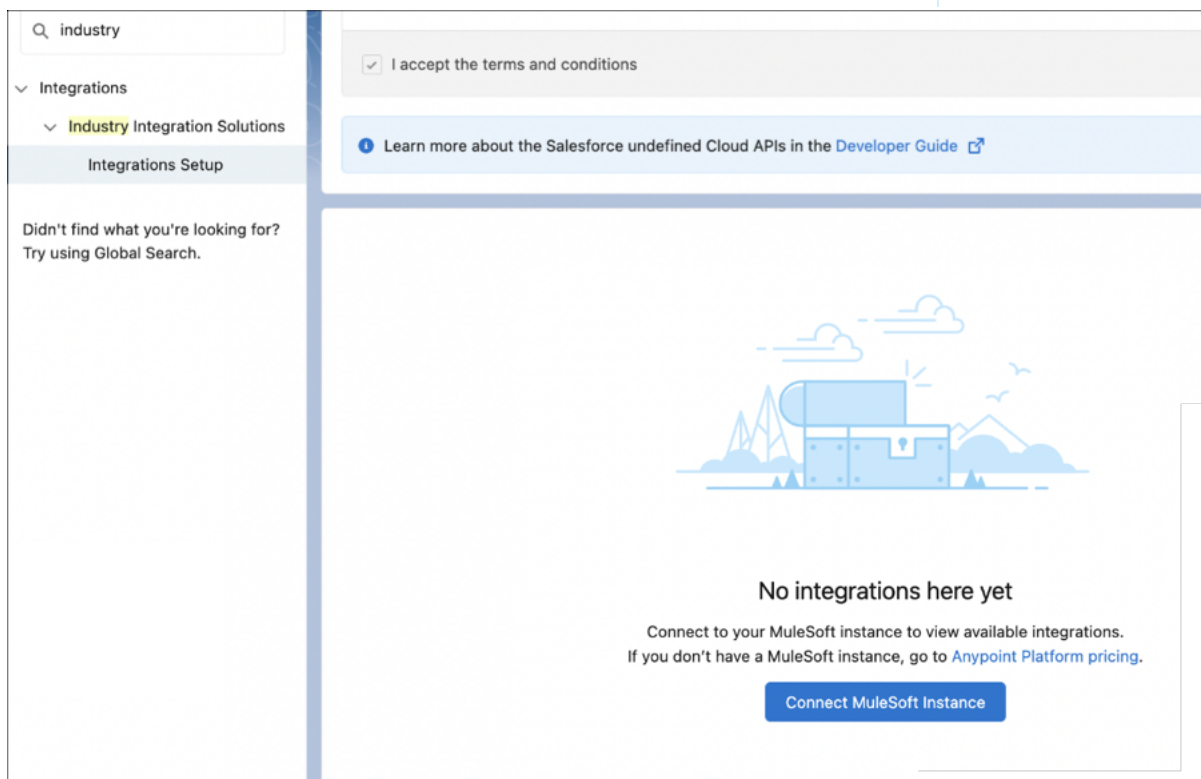To use FSCFinancialAccountsSummary, OmniScript, DataRaptors, FlexCards, and Integration Procedures:

- Financial Services Cloud Extension OR Financial Services Cloud Foundations permission set

  AND

  OmniStudio User OR OmniStudio Admin permissions set

b. To view specific details of a transaction, search for the transaction using these filtering criteria:

- Transaction type
- Transaction description
- Transaction Date Range (Start Date, End Date)
- Transaction Amount Range (Min Amount, Max Amount)

View Real-Time Account and Financial Account Information

Using the Data Consumption Framework, MuleSoft integration, and FlexCards components, show your users real-time account and financial account details and transaction details. The refresh button on the FSCFinancialAccountsSummary, FSCFinancialAccountDetails, and FSCFinancialAccountTransactionDetails components lets your users quickly see up-to-date client financial information.

Enable Real-Time Financial Account Information

Turn on the setting to retrieve real-time financial account and transaction information from your external core banking system. When this setting is off, account information is retrieved from Salesforce.

Enable Mulesoft for Integration

Turn on Mulesoft integration.

Create an Integration Definition for Financial Account Details

Create integration definitions for APIs for Get Financial Account Details.

Create an Integration Definition for Financial Account Transaction Details

Create integration definitions for APIs for Get Financial Account Transaction Details.

Customize Financial Account Cards Using OmniStudio FlexCard Components

In OmniStudio, customize the FSCFinancialAccountsSummary, FSCFinancialAccountDetails and FSCFinancialAccountTransactionDetails components to show information that is most relevant to users. This optional step configures the components to show information with clickable actions that change based on the information they contain. Customize the components that make up the FlexCard component before adding it to record pages.

Add the Source System ID field to the Financial Account page layout. This field shows the ID of the financial account in the core banking system. The ID determines which account to pull data from in the core banking system.

When retrieving real-time financial account data from your core banking system to show on the FSCFinancialAccountSummary and FSCFinancialAccountDetails components, show a blank value for a field rather than the Salesforce value.

Enable Real-Time Financial Account Information

Turn on the setting to retrieve real-time financial account and transaction information from your external core banking system. When this setting is off, account information is retrieved from Salesforce.

1. In Setup, in the Quick Find box, enter `Feature Settings`, and then select **Feature Settings**.

2. Click **Financial Services**.

3. Click **Turn on Real-Time Financial Account Information**.
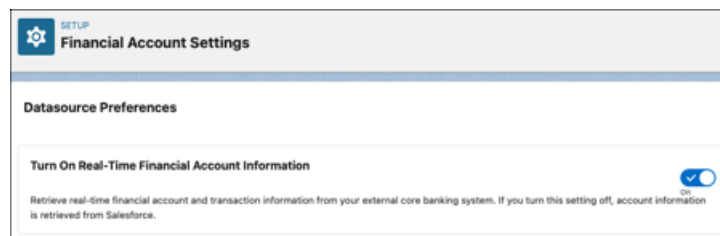
EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use Get Financial Account Details and Get Financial Account Transactions:
- Financial Services Cloud Extension OR Financial Services Cloud Foundations permission set

To assign permissions:
- Customize Application

Enable Mulesoft for Integration

Turn on Mulesoft integration.

1. In Setup, in the Quick Find box, enter `Integrations Setup`, and then select **Integrations Setup**.

2. In Financial Services Cloud Integrations, click **I accept the terms and conditions**.

3. Turn on **Financial Services Cloud Integrations**.

4. Click **Connect to Mulesoft Instance**.

5. Select a service and click **Next**.

6. Enter your Mulesoft username and password and click **Sign In**.

7. Click **Grant Access to *<your username>***.

   It takes a few minutes for Salesforce to connect to Mulesoft.

8. Locate the API to connect to and click **Enable**.

9. In Setup, in the Quick Find box, enter `Named Credential`, and then select **Named Credential**.

10. Verify that a named credential is added with the URL to the enabled MuleSoft connector.
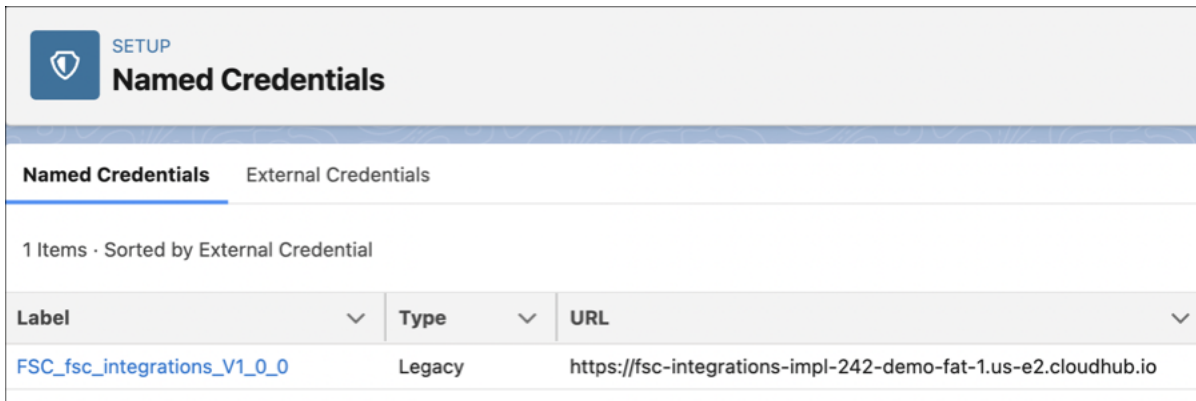
Create an Integration Definition for Financial Account Details

Create integration definitions for APIs for Get Financial Account Details.

1. In Setup, in the Quick Find box, enter `Integration Definitions`, and then select **Integration Definitions**.

2. Click **New**.

3. To create the configuration for Get Financial Account Details, enter the details as shown here:

Field Name	Field Value
Type	Apex Defined
Name	FSC GetBalance
Developer Name	FSC_GetBalance
Description	Config for get balance api

4. Click **Next**.

5. In the Apex Class field, select **financialservices.AccountBalanceServiceIntegrationProvider**.

6. The Attribute Name and Attribute Value are autopopulated. To point to a different named credential, enter an Attribute Name and Attribute Value.

7. Click **Save**.

Create an Integration Definition for Financial Account Transaction Details

Create integration definitions for APIs for Get Financial Account Transaction Details.

1. In Setup, in the Quick Find box, enter `Integration Definitions`, and then select **Integration Definitions**.

2. Click **New**.

3. To create the configuration for Get Financial Account Transaction Details, enter the details as shown here:

Field Name	Field Value
Type	Apex Defined
Name	FSC GetTransaction
Developer Name	FSC_GetTransaction
Description	Config for get transaction api

4. Click **Next**.

5. In the Apex Class field, select **financialservices.TransactionServiceIntegrationProvider**.

6. The Attribute Name and Attribute Value are autopopulated. To point to a different named credential, enter an Attribute Name and Attribute Value.

7. Click **Save**.

Customize Financial Account Cards Using OmniStudio FlexCard Components

In OmniStudio, customize the FSCFinancialAccountsSummary, FSCFinancialAccountDetails and FSCFinancialAccountTransactionDetails components to show information that is most relevant to users. This optional step configures the components to show information with clickable actions that change based on the information they contain. Customize the components that make up the FlexCard component before adding it to record pages.

The FlexCard Designer is a declarative tool that makes it easy to build Lightning web components without code. Build a FlexCard by dragging elements onto its canvas. Creating UI components with FlexCards is all about sourcing the data and displaying and organizing the returned information in a meaningful way.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

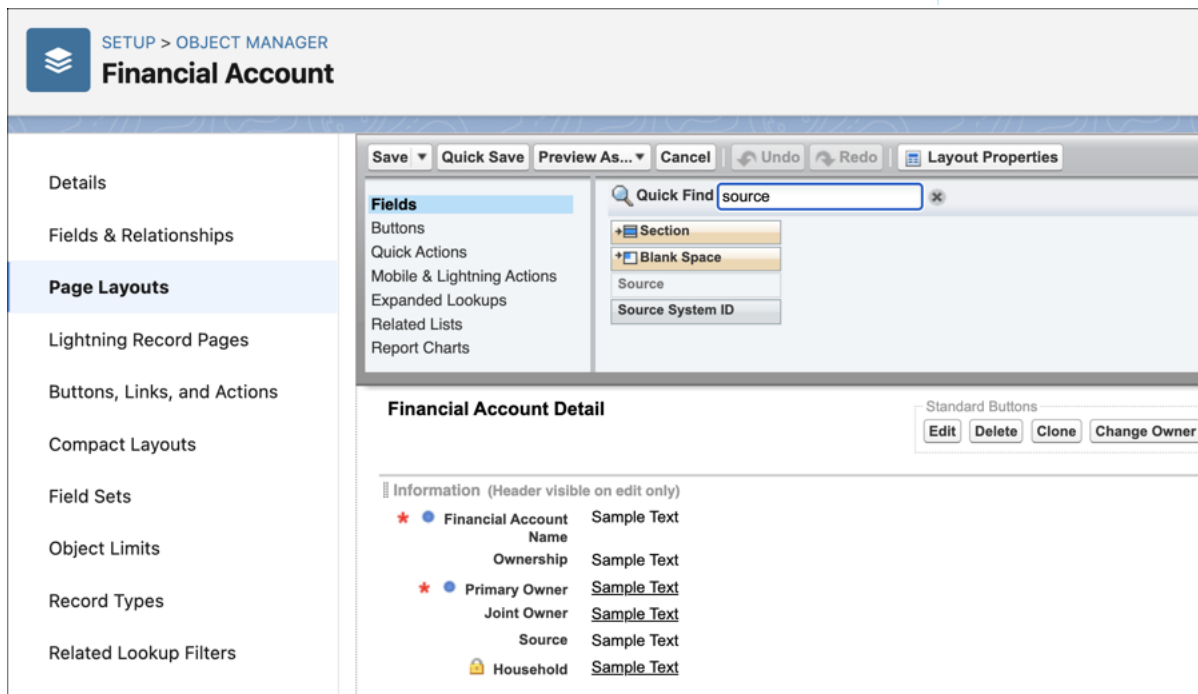To use Get Financial Account Details and Get Financial Account Transactions:
- Financial Services Cloud Extension OR Financial Services Cloud Foundations permission set

To assign permissions:
- Customize Application

1. From the App Launcher, fine and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. To customize a component, click it and edit the properties.
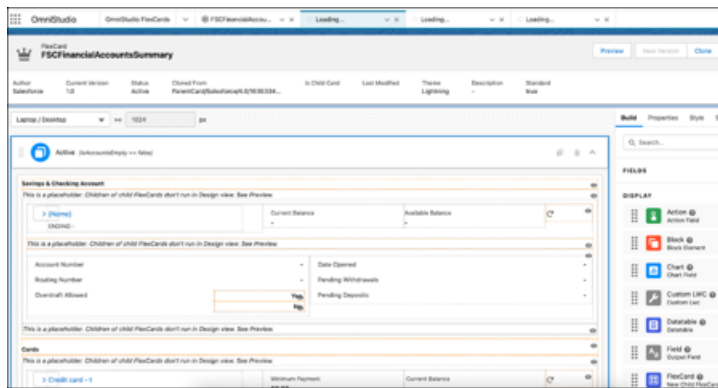
4. Save your changes.

Customize the Financial Account Page Layout

Add the Source System ID field to the Financial Account page layout. This field shows the ID of the
financial account in the core banking system. The ID determines which account to pull data from
in the core banking system.

> ✏️ **Note:** The Financial Services Cloud managed package must be installed in Salesforce before
> you can complete these steps.

1. In Setup click **Object Manager**.

2. In the search box, enter Financial Account and select **Financial Account (Banking) Layout**.

3. Click **Page Layouts**.

4. In the Quick Find box, enter `Source System ID`.

5. Drag the **Source System ID** field to the Information pane.

EDITIONS

Available in: Lightning
Experience

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

USER PERMISSIONS

To use Get Financial Account
Details and Get Financial
Account Transactions:
- Financial Services Cloud
  Extension OR Financial
  Services Cloud
  Foundations permission
  set

To assign permissions:
- Customize Application

6. Save your changes.

7. Complete steps 2 through 6 for other Financial Account page layouts where you're viewing real-time account and financial account information using the FSCFinancialAccountsSummary, FSCFinancialAccountDetails, and FSCFinancialAccountTransactionDetails components.

SEE ALSO:

Customize DataRaptors to Show Blank Values

When retrieving real-time financial account data from your core banking system to show on the FSCFinancialAccountSummary and FSCFinancialAccountDetails components, show a blank value for a field rather than the Salesforce value.

For example, if you want the field AvailableCredit to show real-time data from your core banking system, clone the FSCFetchFinanaiclAccountDetails DataRaptor and add a formula to show the Salesforce field value for AvailableCredit as blank.

FSCFetchFinancialAccountDetails — performs the extraction of field values for Financial Accounts. Fields can be added or removed from the DataRaptor to determine the fields that show on the FSCFinancialAccountsSummary and FSCFinancialAccountDetails components.

FSCTransformFinancialAccountsData — transforms the field values from the FSCFetchFinancialAccountDetails DataRaptor into an output so the fields can display on the FSCFinancialAccountsSummary and FSCFinancialAccountDetails cards.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio DataRaptors**.

3. Select **FSCTransformFinancialAccountsData** and click **Clone**.

4. Enter a name for the cloned DataRaptor and click **Save**.
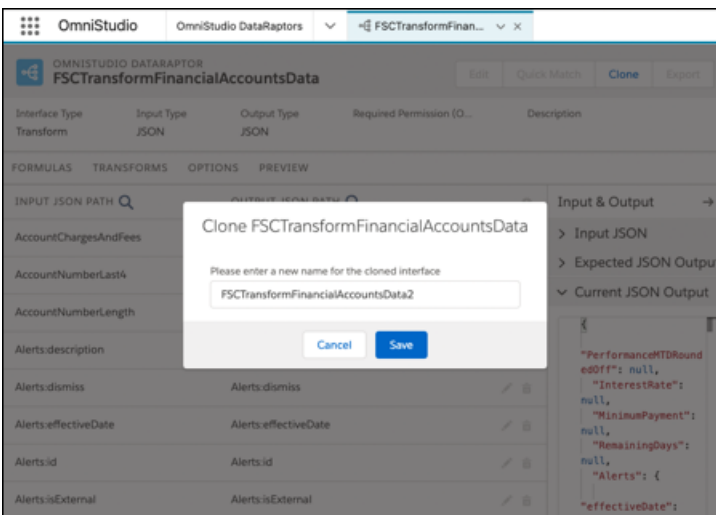
5. In the new DataRaptor, select the **Formula** tab.

6. Find the Formula Result Path for Balance and copy the formula.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use FSCFinancialAccountsSummary, OmniScript, DataRaptors, FlexCards, and Integration Procedures:
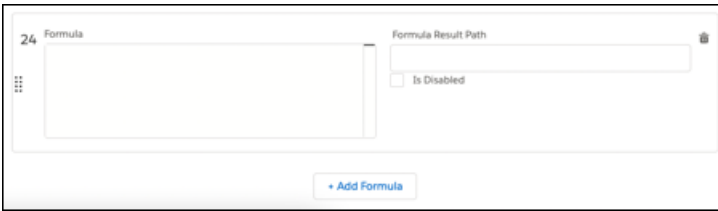
- Financial Services Cloud Extension OR Financial Services Cloud Foundations permission set

  AND

  OmniStudio User OR OmniStudio Admin permissions set

7. Scroll to the bottom, click **+Formula**, and paste the formula in the formula field.

8. Replace the field in the formula with your field: FSCFetchFinancialAccountDetails:FinancialAccounts:`<fieldname>`

9. Click the **Transforms** tab.

10. Remove the transform for the field: FSCFetchFinancialAccountDetails:FinancialAccounts: `<fieldname>`.

> 📝 Note: This line only applies to fields that are already being fetched in the FSCFetchFinancialAccountDetails DataRaptor. If the
> field is new, or the line doesn't exist, skip this step.

11. Click the plus icon and enter the details like this:

   - Input JSON Path: `<field>`
   - Output JSON Path: `<field>`
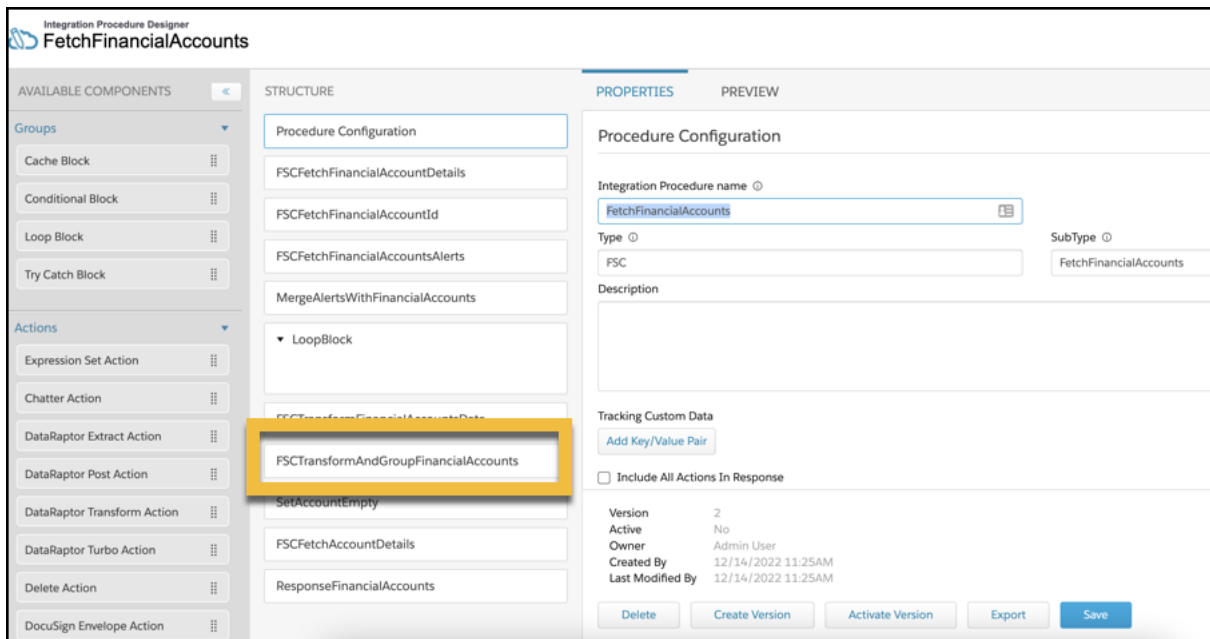   - Output Data Type: **String**
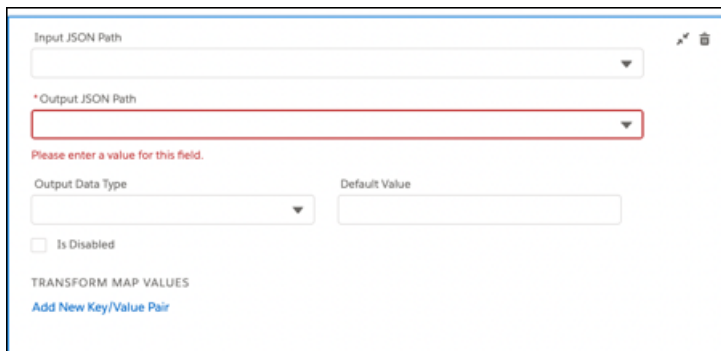
12. Update the DataRaptor referenced in the FetchFinancialAccounts Integration Procedure.

   a. In the OmniStudio app, from the navigation bar, select **OmniStudio Integration Procedures**.
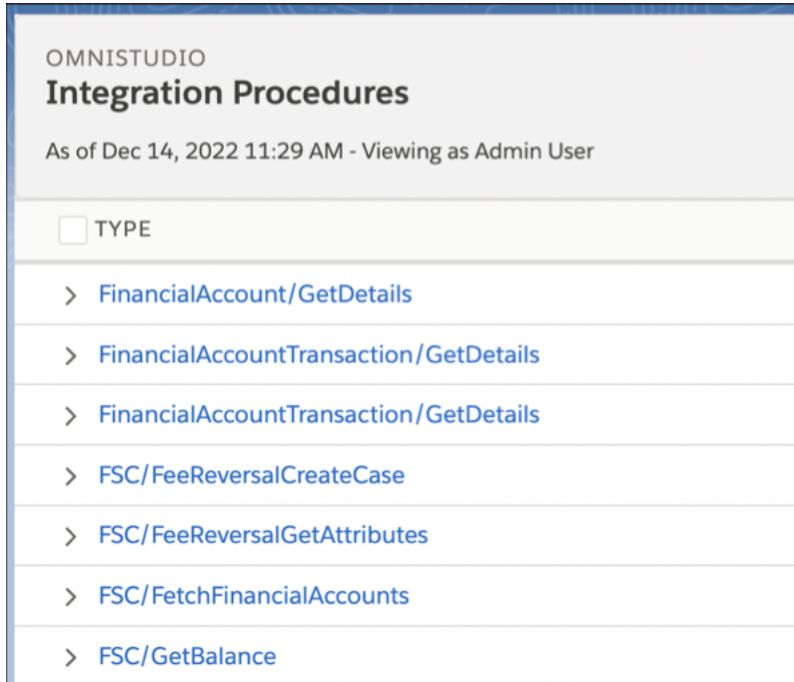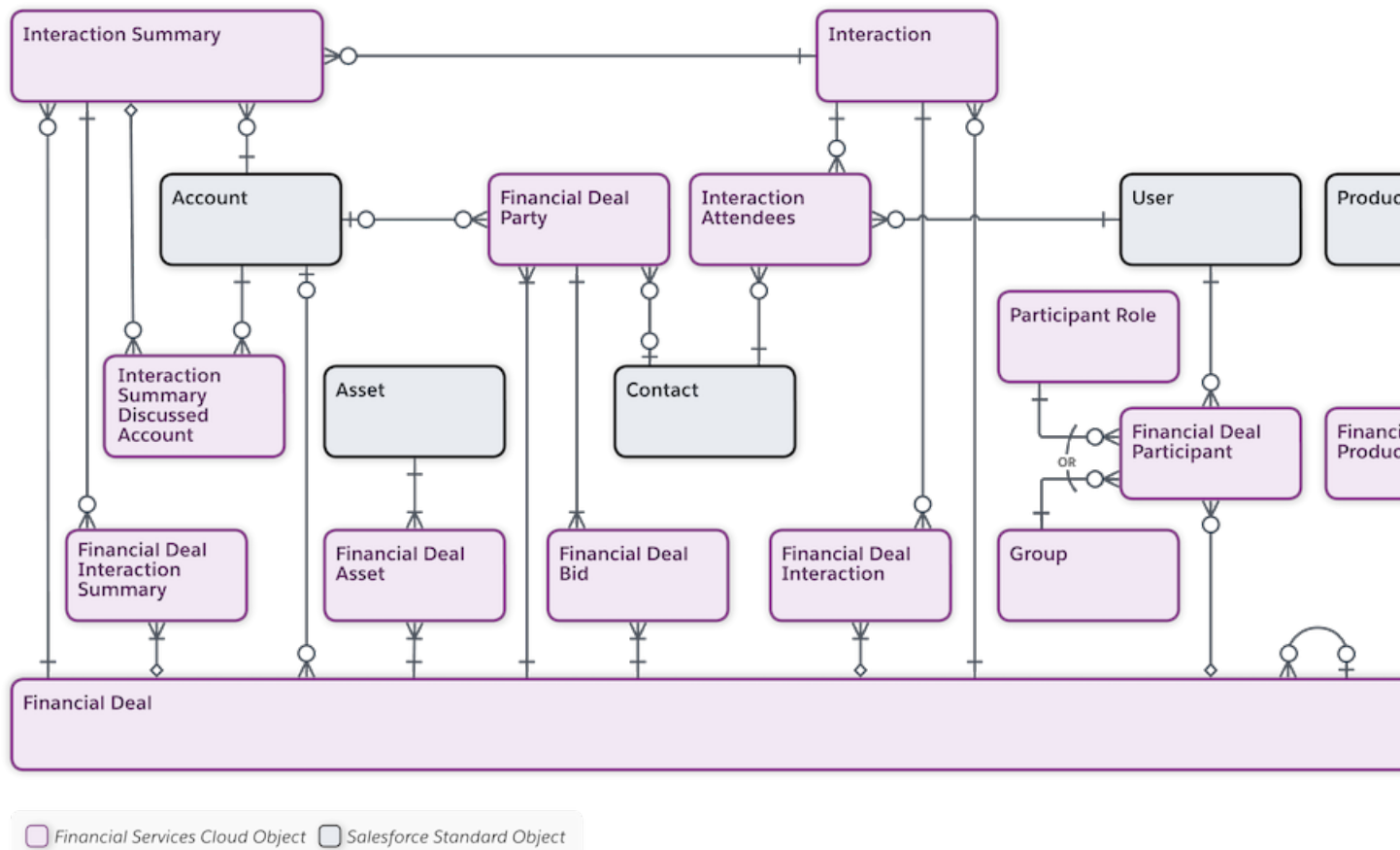
b. Select FSC/FetchFinanicalAccounts.

c. Click **Procedure Configuration**.

d. Click **Create Version**.

e. Replace the existing DataRaptor with the one you created.

f. Activate the Integration Procedure.

Financial Deal Management

Track and manage a financial deal lifecycle. By using the Financial Deal Management data model, deal teams can manage every aspect of deal-related information and take advantage of compliant, role-based data sharing options. They can create new financial deal records that specify a deal's stage, status, probability of deal success, and more. And to maintain compliance, they can share deal records that contain confidential information only with relevant stakeholders.

Enable and Configure Financial Deals

To enable the financial deal management feature in your Salesforce org, enable the Deal Management setting.

Configure Sharing Settings for Financial Deals

Give your users access to financial deals using Salesforce data sharing features such as organization-wide defaults, role hierarchy, and rules. Like all standard objects, the Grant Access Using Hierarchies option is enabled for the Financial Deal object. As a result, users in a role hierarchy have access to financial deals for all users that are below them. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in the hierarchy, disable the Role Hierarchy-Based Sharing for Deal Management setting. You can't disable this option from the Organization-Wide Defaults list on the Sharing Settings page.

Work with Financial Deals

With Financial Deal Management data model, deal teams can take detailed meeting notes, specify the confidentiality level of a deal, its status, the probability of it closing successfully, and more. To maintain compliance, deal teams can also share notes that contain confidential information only with relevant stakeholders.

Enable and Configure Financial Deals

To enable the financial deal management feature in your Salesforce org, enable the Deal Management setting.

1. Enable the Deal Management setting.

   a. From Setup, in the Quick Find box, enter `Deal Management`, and then select **Deal Management Settings**.

   b. Select **Deal Management**.

2. To let your deal teams handle many-to-many relationships between financial deals and interaction summaries, and financial deals and interactions, select **Use Many-to-Many Relationships**.

   You can select this setting, for example, to relate multiple financial deals to multiple (or single) interaction or interaction summary.

   a. If you want the components for financial deal management (Manage Participants and Interaction Summaries) to use the mappings from the financial deal junction objects, enable **Map Interaction and Interaction Summary to a Financial Deal using Junction Objects**.

      📝 Note: Financial Deal Interaction Summary and Financial Deal Interaction are the junction objects in the Financial Deal data model. If you enable mappings from junction objects, the components ignore the direct lookup relationships from the interaction or interaction summary objects.

3. Add the Financial Deal Parties component to the financial deal page.

   a. On the financial deal record page, click the Setup icon, and select **Edit Page**.

   b. Drag the Financial Deal Parties component to the page.

   c. Save your changes.

<table>
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EDITIONS

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

USER PERMISSIONS

To enable and configure financial deals:
- Financial Services Cloud Extension permission set

  AND

  Customize Application

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</table>

Configure Sharing Settings for Financial Deals

Give your users access to financial deals using Salesforce data sharing features such as organization-wide defaults, role hierarchy, and rules. Like all standard objects, the Grant Access Using Hierarchies option is enabled for the Financial Deal object. As a result, users in a role hierarchy have access to financial deals for all users that are below them. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in the hierarchy, disable the Role Hierarchy-Based Sharing for Deal Management setting. You can't disable this option from the Organization-Wide Defaults list on the Sharing Settings page.

To share a financial deal and to see the Financial Deal Participant object in the org, ensure that compliant data sharing is enabled for the Financial Deal object.

1. To prevent users from gaining automatic access to financial deals owned by or shared with their subordinates in a role hierarchy, disable the Role Hierarchy-Based Sharing for Deal Management setting. This action disables the Grant Access Using Hierarchies option for the Financial Deal object.

   a. From Setup, in the Quick Find box, enter `Deal Management`, and then select **Deal Management Settings**.

   b. Disable **Role Hierarchy-Based Sharing for Financial Deals**.

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EDITIONS

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

USER PERMISSIONS

To configure sharing settings for financial deals:
- Financial Services Cloud Extension permission set

  AND

  Customize Application

</td></tr>
</table>

> **Note:** This setting is available only if the Deal Management setting is enabled.

2. To configure advanced, compliant data sharing rules for financial deals, enable compliant data sharing for the Financial Deal object.

   a. From Setup, in the Quick Find box, enter `Compliant Data Sharing`, and then select **Object Enablement Settings**.

   b. Enable **Financial Deal**.

   To share a financial deal and to access the Financial Deal Participant object, ensure that compliant data sharing is enabled for the Financial Deal object.

Work with Financial Deals

With Financial Deal Management data model, deal teams can take detailed meeting notes, specify the confidentiality level of a deal, its status, the probability of it closing successfully, and more. To maintain compliance, deal teams can also share notes that contain confidential information only with relevant stakeholders.

Create a Financial Deal Record

Capture the terms of a financial deal in a financial deal record. Deal teams can specify details such as a deal's confidentiality level, status, stage, expected close date, and close probability. They can also capture notes and next steps by creating interaction summaries linked with interactions.

View Details About Financial Deal Parties

Quickly identify the accounts or contacts that are involved parties in a financial deal, the parties' roles, and more. See which contacts from the account are involved, which users they've interacted with, and interaction details.

Share a Financial Deal

You can share a financial deal record from the Financial Deal Participants related list or by using the Manage Participants component.

Path Settings for Financial Deals

Enable Path for the Financial Deal object to improve deal teams' success. You can define steps that are important for a financial deal execution and include customized guidance for every step of a path.

Create Action Plans for Financial Deal Objects

Use action plans to capture repeatable tasks in templates and then automate the task sequences. With action plans, you can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific financial deal engagements.

Create a Financial Deal Record

Capture the terms of a financial deal in a financial deal record. Deal teams can specify details such as a deal's confidentiality level, status, stage, expected close date, and close probability. They can also capture notes and next steps by creating interaction summaries linked with interactions.

1. From the App Launcher, select **Financial Deals**.

2. Change the list view to **All Financial Deals**.

3. Click **New**.

4. Enter a name for the financial deal.

5. Specify the other details, such as deal type, stage, confidentiality, status, expected close date, and close probability.

6. Save your changes.

View Details About Financial Deal Parties

Quickly identify the accounts or contacts that are involved parties in a financial deal, the parties' roles, and more. See which contacts from the account are involved, which users they've interacted with, and interaction details.

Ensure that the Financial Deal Parties Lightning component is added to the financial deal record page.

1. On a financial deal record page, in the Financial Deal Parties component, expand an account to see which contacts are involved.

2. View the users who interacted with a contact by clicking 👤 .

3. View details about an interaction by clicking 🖉 .

Share a Financial Deal

You can share a financial deal record from the Financial Deal Participants related list or by using the Manage Participants component.

Share a Financial Deal from the Financial Deal Participants Related List

Give users access to a record without writing complex code. You can share a financial deal record with a user or a group by adding them as participants to the record from the Financial Deal Participants related list. With this approach, you can share a record with only one user or a group at a time.

Share a Financial Deal Using the Manage Participants Component

When you add the Manage Participant component to a financial deal record page, deal teams can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Share a Financial Deal from the Financial Deal Participants Related List

Give users access to a record without writing complex code. You can share a financial deal record with a user or a group by adding them as participants to the record from the Financial Deal Participants related list. With this approach, you can share a record with only one user or a group at a time.

To share a financial deal and to access the Financial Deal Participant object, ensure that compliant data sharing is enabled for the Financial Deal object.

1. From a financial deal record page, on the Financial Deal Participants related list, click **New**.

2. From the Participant list, search for and select the user or the group that you want to share the financial deal with.

3. Select a participant role, enter comments, and select **Active**.

4. Save your changes.

Share a Financial Deal Using the Manage Participants Component

When you add the Manage Participant component to a financial deal record page, deal teams can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Ensure that compliant data sharing is enabled for the Financial Deal object.

1. Add the Manage Participants component to the financial deal record page.

   a. On the financial deal record page, click the Setup icon, and select **Edit Page**.

   b. Drag the Manage Participants component to the page layout.

   c. Save your changes.

2. Configure the suggestions list.

   You can configure the component then select participant types. Users or groups from these types appear as suggestions.

   a. From the financial deal record page, click the Setup icon, and select **Edit Page**.

   b. Click anywhere on the Manage Participants component to select it.

   c. In the properties pane, under Participant Types for Suggestion List, click **Select**.

   d. Move the required participant types to the Selected list, and click **OK**.

   e. Save your changes.

   For sharing financial deals, the Manage Participant component supports only Account participants as participant types for the suggestion list.

3. Add users or groups as participants.

   a. From a financial deal record page, on the Manage Participants component, click **Add**.

   b. Search for and select users or groups, or select them from the Suggested Users or Groups section.

   c. Click **Next**.

    d. Select a participant role for every user or group, enter comments, and select **Active**.

    e. Click **Finish**.

    f. Save your changes.

Path Settings for Financial Deals

Enable Path for the Financial Deal object to improve deal teams' success. You can define steps that are important for a financial deal execution and include customized guidance for every step of a path.

You can create one path for each available combination of object, picklist, and record type for a financial deal. The supported picklist values are: Confidentiality Type, Conflict Status, Stage, and Status.

EDITIONS

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

USER PERMISSIONS

To enable path settings for finanical deals:
- Financial Services Cloud Extension permission set

    AND

    Modify All Data OR Customize Application

Create Action Plans for Financial Deal Objects

Use action plans to capture repeatable tasks in templates and then automate the task sequences. With action plans, you can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific financial deal engagements.

SEE ALSO:

    Action Plans

EDITIONS

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

Financial Plans and Goals

Help your clients plan for and reach their short and long-term financial objectives using the Financial Goals and Financial Plans objects. These objects are available with your Financial Services Cloud license. Financial plans and goals use OmniStudio for added customization.

A financial plan is a collection of financial goals that provides a comprehensive view of your client's goals. Quickly view details of each goal in a plan, such as goal progress and feasibility of success. For example, your client has a financial plan for retirement that includes a financial goal to cover post-retirement monthly expenses. Before the client starts contributing, the goal has a 0% feasibility of success. When you update the goal and link a financial account and specify contributions that allow them to reach their goal by retirement, the feasibility value changes.

EDITIONS

Available in: Lightning Experience

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

Set Up Financial Plans and Goals

Assign permission sets, object permissions, and customize lightning pages with financial plans and goals FlexCards.

Work with Financial Plans and Goals

Help your clients reach their short and long-term financial goals using financial plans and goals objects. FlexCards give your users quick access to their client's plans and goals. View goal priority, status, and members to help your clients focus on goals most important to them.

Customize the Financial Plan FlexCard Open Planning Tool Button

To give your users quick access to your financial planning tool from the FSCFinancialPlanDetails FlexCard, update the Open Planning Tool button URL in OmniStudio. Add the cloned FlexCard to the person account and household record pages.

Considerations and Limitations Financial Plans and Goals

Keep these points in mind when using financial plans and goals.

Financial Plans and Goals FlexCards and Related Components

The Financial Plans and Goals FlexCards depend on OmniScripts, Integration Procedures, and DataRaptors to perform their functions.

Financial Goals OmniScripts and Related Components

The Financial Goals OmniScripts depend on child OmniScripts, embedded FlexCards, Integration Procedures, and DataRaptors to perform their functions.

Set Up Financial Plans and Goals

Assign permission sets, object permissions, and customize lightning pages with financial plans and goals FlexCards.

EDITIONS

Available in: Lightning Experience

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

Assign OmniStudio Permissions

Financial plans and goals use OmniStudio to create a customized experience for creating, editing, and deleting financial goals. Give users access to OmniStudio so that they can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures.

Assign Permissions for Objects

Make sure that users have access to Financial Goal, Financial Plan, and Account objects. You can assign access to Advisor, Personal Banker, or custom profiles.

Customize the Financial Goal Page Layout

Let your users associate a financial plan to a goal. Add the Financial Plan field to the Financial Goal page layout.

Customize Lightning Pages to View Financial Goals

Stay on top of your client's financial goals by adding components to the person account, household, and financial goal record pages.

Assign OmniStudio Permissions

Financial plans and goals use OmniStudio to create a customized experience for creating, editing, and deleting financial goals. Give users access to OmniStudio so that they can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures.

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

2. Make sure that the OmniStudio Admin or OmniStudio User permission set is assigned to your users.

3. If a permission set isn't assigned to a user, follow these steps:

    a. In the Permission Set Assignments related list, click **Edit Assignments**.

    b. Add the OmniStudio Admin or OmniStudio User permission set to Enabled Permission Sets.

    c. Save your changes.

SEE ALSO:

OmniStudio

Assign Permissions for Objects

Make sure that users have access to Financial Goal, Financial Plan, and Account objects. You can assign access to Advisor, Personal Banker, or custom profiles.

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

2. Click **Edit** for the profile that you want to edit.

3. In the Custom Tab Settings, select tab visibility for these objects:

    - Financial Goal
    - Financial Plan
    - Account

4. Under Standard Object Permissions, for Financial Goal, Financial Plan, and Account, select these access levels:

    - Read
    - Create
    - Edit
    - Delete
    - View All
    - Modify All

5. Under Custom Object Permissions, select these access levels for Financial Goal, Financial Account, Financial Goal Fundings, Financial Goal Parties, Financial Account Roles, and Account Contact Relation:

- Read
- Create
- Edit
- Delete

6. Save your changes.

Customize the Financial Goal Page Layout

Let your users associate a financial plan to a goal. Add the Financial Plan field to the Financial Goal page layout.

1. From Setup, click **Object Manager**.

2. Click **Financial Goal** object.

3. Click **Page Layouts** and open **Financial Goal Layout**.

4. Drag **Financial Plan** from the available fields and add it to the Information section.

5. Save your changes.

Customize Lightning Pages to View Financial Goals

Stay on top of your client's financial goals by adding components to the person account, household, and financial goal record pages.

- Add the FinancialGoals FlexCard to the person account and household record pages.
- Add the GoalMembers FlexCard to the financial goal record page.
- Add the FSCFinancialPlanDetails FlexCard to the household and person account record pages.
- Add the FinancialGoalsFundingHeader FlexCard to the financial account record page.

1. To add the component to the person account and household record page, follow these steps:

    a. On the person account record page, go to Lightning App Builder.

    b. Drag the FlexCard component from the Components panel into position on the record page.

    c. In the Properties pane, select the **FinancialGoals** FlexCard component in the FlexCard Name field.

    d. Save your changes.

    e. If your page is new, activate the page.

    f. Repeat these steps for a household record page.

2. To add the component to the financial goal record page, follow these steps:

    a. On the financial goal record page, go to Lightning App Builder.

    b. Drag the FlexCard component from the Components panel into position on the record page.

    c. In the Properties pane, select the component in the **GoalMembers** FlexCard Name field.

    d. Save your changes.

    a. If your page is new, activate the page.

3. To add the component to the household and person account record page, follow these steps:

    a. On the household record page, go to Lightning App Builder.

    b. Drag the FlexCard component from the Components panel into position on the record page.

    c. In the Properties pane, select the component in the **FSCFinancialPlanDetails** FlexCard Name field.

    d. Save your changes.

    a. If your page is new, activate the page.

4. To add the component to the financial account record page, follow these steps:

    a. On the financial account record page, go to Lightning App Builder.

    b. Drag the FlexCard component from the Components panel into position on the record page.

    c. In the Properties pane, select the component in the **FinancialGoalsFundingHeader** FlexCard Name field.

    d. Save your changes.

    a. If your page is new, activate the page.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use financial plans and goals, OmniScript, DataRaptors, FlexCards, and Integration Procedures:
- Financial Services Cloud Extensions permission set

    AND

    OmniStudio User OR OmniStudio Admin permissions set

Work with Financial Plans and Goals

Help your clients reach their short and long-term financial goals using financial plans and goals objects. FlexCards give your users quick access to their client's plans and goals. View goal priority, status, and members to help your clients focus on goals most important to them.

Create a Financial Goal

On the FinancialGoals FlexCard, add a new financial goal.

View Financial Goals and Goal Members

View your client's financial goals on the FinancialGoals FlexCard and view goal members goals on the GoalMembers FlexCard.

Edit a Financial Goal

On the FinancialGoals FlexCard, edit a financial goal.

View and Distribute Funds

View a list of the financial goals that are funded by a financial account using the FinancialGoalsFundingHeader FlexCard. You can also distribute funds from the financial account to the goals.

Create a Financial Plan and Goals

Create a financial plan for a person account or household record type and add goals.

View a Financial Plan and Goals on a Household Record

View a person account or household's financial plan and its related financial goals in the FSCFinancialPlanDetails FlexCard.

Create a Financial Goal

On the FinancialGoals FlexCard, add a new financial goal.

1. Click a person account or household account record.

2. On the FinancialGoals FlexCard, click **Add Goal**.

3. On the Goal Details screen, complete the Goal Definition, Goal Information, and Amount.

4. Click **Next**.

5. On the Goal Members screen, confirm the goal member.

   a. To add new goal members, in the Members box, enter a name. Select a member and click **Add Member**.

   b. To remove goal members, select the goal member and click **Remove**.

6. Click **Next**.

7. On the Link Financial Account screen, select a financial account to fund the goal.

   A financial goal can be funded by only one financial account.

   To show the financial account associated with a goal, the account must be associated with the person account or household that's associated with the goal.

   a. To view the details and other goals funded by the financial account, select a financial account.

8. Save your changes.

View Financial Goals and Goal Members

View your client's financial goals on the FinancialGoals FlexCard and view goal members goals on the GoalMembers FlexCard.

1. Click a person account or household account record.

2. On the FinancialGoals FlexCard, view these details:

   - Goal name
   - Goal actual amount
   - Goal priority and status
   - Goal percentage of target value achieved
   - Goal target date
   - Financial Account Name

3. To view goal details, click a Financial Goal record.

4. On the GoalMembers FlexCard, view these details:

   - Goal member name
   - Goal member email
   - Goal member phone
   - Goal member household

Edit a Financial Goal

On the FinancialGoals FlexCard, edit a financial goal.

1. Click a person account or household account record.

2. On the FinancialGoals FlexCard, click the action menu on a goal, then click **Edit**.

3. On the Goal Details screen, update the goal details and click **Next**.

4. On the Goal Members screen, confirm the goal member.

   a. To add new goal members, in the **Members** box, enter a name. Select a member and click **Add Member**.

   b. To remove goal members, select the goal member and click **Remove**.

5. On the Link Financial Account screen, select a financial account to fund the goal.

    To show the financial account associated with a goal, the account must be associated with the person account or household that's associated with the goal.

    a. To view the details and other goals funded by the financial account, select a financial account.

    b. To remove all financial accounts from the goal, select **Don't associate a financial account**.

6. Save your changes.

View and Distribute Funds

View a list of the financial goals that are funded by a financial account using the FinancialGoalsFundingHeader FlexCard. You can also distribute funds from the financial account to the goals.

1. Click a Financial Account record.

2. On the FinancialGoalsFundingHeader FlexCard, view these financial goal details:

    - Goal Name
    - Target Value
    - Priority
    - Amount

3. Funding Available for Goals shows the remaining balance of the financial account after funds have been distributed to the associated goals.

4. To update the amount, click a goal amount.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use financial plans and goals, OmniScripts, DataRaptors, FlexCards, and Integration Procedures:
- Financial Services Cloud Extensions permission set

    AND

    OmniStudio User OR OmniStudio Admin permissions set

Create a Financial Plan and Goals

Create a financial plan for a person account or household record type and add goals.

1. Select the **Financial Plans** object and click **New**.

   a. Complete the plan details and click **Save**.

2. Select the **Financial Goals** object and click **New**.

   a. Complete the goal details.

   b. To associate a plan to a goal, select a financial plan.

   c. Save your goal.

View a Financial Plan and Goals on a Household Record

View a person account or household's financial plan and its related financial goals in the FSCFinancialPlanDetails FlexCard.

1. Click a person account or household account record.

2. On the FSCFinancialPlanDetails FlexCard, view these financial plan details:

   - Name
   - Type
   - Status
   - Start Date
   - Last Updated
   - Estimated Success Percent

3. On the FSCFinancialPlanFinancialGoals FlexCard, view these details about each financial goal related to a financial plan:

   - Goal Name
   - Target Amount
   - Payment Frequency
   - Probability
   - Target Date
   - Start Date

- Priority

> **Note:** To use your company's financial planning tool, your Salesforce admin must configure the Open Planning Tool button.

Customize the Financial Plan FlexCard Open Planning Tool Button

To give your users quick access to your financial planning tool from the FSCFinancialPlanDetails FlexCard, update the Open Planning Tool button URL in OmniStudio. Add the cloned FlexCard to the person account and household record pages.

1. In the App Launcher, select **OmniStudio**.

2. In the picklist, select **OmniStudio FlexCards**.

3. Select the **FSCFinancialPlanDetails FlexCard**.

4. To customize the Open Planning Tool button, click **Clone**.

   a. Enter a name and click **Clone**.

5. On the cloned FlexCard, customize the Open Planning Tool button on the Active and EmptyState blocks.

6. In the Action block, click the button. In the Properties plan expand the **Action** section.

   a. For Target, select a page reference type.

   b. For URL, enter the URL of the page to which to navigate.

   c. For Open Target In, select the location to open the target page.

   d. Complete these steps for the button in the EmptyState block.

   e. Activate the FlexCard.

7. Add the cloned FSCFinancialPlanDetails FlexCard to the person account and household record pages.

Considerations and Limitations Financial Plans and Goals

Keep these points in mind when using financial plans and goals.

- If you don't add a member to a financial goal when you create it, navigate to the financial goal record page to add a member.
- To show a goal on a household record page, one of the goal members must be a member of the household.
- There's no limit on the number of members that you can add to a goal.
- When you create a goal from a household record, be sure to add a member of that household as a goal member so the goal shows on the household record.
- One financial account can fund one or more financial goals.
- One financial goal can be funded by only one financial account.
- To show the financial account associated with a goal, the account must be associated with the person account or household that's associated with the goal.
- Don't edit, delete, or deactivate the Goal Category default values of Expenditure and Capital (values are case-sensitive) on the Financial Goal object. The FSCFinancialPlanGoal FlexCard uses these two default values to show plans and goals.

Financial Plans and Goals FlexCards and Related Components

The Financial Plans and Goals FlexCards depend on OmniScripts, Integration Procedures, and DataRaptors to perform their functions.

OmniScripts are described in a separate topic, because they have their own dependencies.

For detailed steps on how to version, clone, edit, and activate OmniStudio components, see the OmniStudio documentation.

Financial Plans FlexCards

The Financial Plans FlexCards display financial plans for a person account or household.

Integration Procedures for Financial Plans FlexCards

The Financial Plans FlexCards depend on the following Integration Procedures.

DataRaptors for Financial Plans FlexCards

The Financial Plans FlexCards depend on the following DataRaptors.

Financial Goals FlexCards

The Financial Goals FlexCards display all the financial goals for a person account or household and let users create, edit, and delete these goals and their members.

Integration Procedures for Financial Goals FlexCards

The Financial Goals FlexCards depend on the following Integration Procedures.

DataRaptors for Financial Goals FlexCards

The Financial Goals FlexCards depend on the following DataRaptors.

SEE ALSO:

OmniStudio

Financial Plans FlexCards

The Financial Plans FlexCards display financial plans for a person account or household.

📝 **Note:** To access Financial Plans FlexCards, users need the Financial Services Cloud Extension and OmniStudio User permission sets.

FSCFinancialPlanDetails FlexCard

Displays the financial plans associated with an account. Add to a PersonAccount, Household, or PartyRelationshipGroup record page.

Data Source: GetFinancialPlansForAccount Integration Procedure

Child FlexCard: FSCFinancialPlanFinancialGoals

Calls: FSCGetFinancialPlanFromList DataRaptor Transform (via changeselectedplan Event Listener Action)

FSCFinancialPlanFinancialGoals FlexCard

Shows financial goals associated with a plan. Retrieves goals associated with a plan from the integration procedure and passes the data to the child FlexCard FSCFinancialPlanGoal. Acts as a container to the goal cards.

Data Source: GetGoalsForPlan Integration Procedure

Parent FlexCard: FSCFinancialPlanDetails

Child FlexCard: FSCFinancialPlanGoal

Calls: FSCFinancialGoalRemoveDuplicateGoal DataRaptor Transform (via loadmoredata Event Listener Actions)

FSCFinancialPlanGoal FlexCard

Show financial goal information associated with a financial plan.

Data Source: Same as parent

Parent FlexCard: FSCFinancialPlanFinancialGoals

Integration Procedures for Financial Plans FlexCards

The Financial Plans FlexCards depend on the following Integration Procedures.

GetFinancialPlansForAccount Integration Procedure

Retrieves all Financial Plan records related to the current PersonAccount, Household, or PartyRelationshipGroup record.

Called By: FSCFinancialPlanDetails FlexCard

Calls:

- FSCReturnIdIfPartyRelationshipGroup DataRaptor Extract
- fschousehold.FSCPlanService Apex class, FinancialPlanStatus method
- fschousehold.FSCPlanService Apex class, FinancialPlanType method
- FSCGetFinancialPlansForAccount DataRaptor Extract

GetGoalsForPlan Integration Procedure

Called By: FSCFinancialPlanFinancialGoals FlexCard

Calls:

- FSCGetFinancialGoalsForPlan DataRaptor Extract
- fschousehold.FSCGoalService Apex class, FinancialGoalPriority method
- fschousehold.FSCGoalService Apex class, FinancialGoalStatus method
- fschousehold.FSCGoalService Apex class, FinancialGoalFrequency method
- FSCFinancialGoalsTransform DataRaptor Transform

DataRaptors for Financial Plans FlexCards

The Financial Plans FlexCards depend on the following DataRaptors.

FSCGetFinancialPlanFromList DataRaptor Transform

Retrieve the Financial Plan with the specified ID from a list of Financial Plans.

Called By: FSCFinancialPlanDetails FlexCard

FSCFinancialGoalRemoveDuplicateGoal DataRaptor Transform

Transforms the list of Financial Goals for a Financial Plan. Remove duplicate goals from the FSCFinancialPlanFinancialGoals FlexCard.

Called By: FSCFinancialPlanFinancialGoals FlexCard

FSCReturnIdIfPartyRelationshipGroup DataRaptor Extract

Returns True if the current record page is for a PartyRelationshipGroup.

Called By: GetFinancialPlansForAccount Integration Procedure

FSCGetFinancialPlansForAccount DataRaptor Extract

Retrieves Financial Plans associated with an Account.

Called By: GetFinancialPlansForAccount Integration Procedure

FSCGetFinancialGoalsForPlan DataRaptor Extract

Retrieves Financial Goals related to a Financial Plan.

Called By: GetGoalsForPlan Integration Procedure

FSCFinancialGoalsTransform DataRaptor Transform

Transforms Financial Goal data.

Called By: GetGoalsForPlan Integration Procedure

Financial Goals FlexCards

The Financial Goals FlexCards display all the financial goals for a person account or household and let users create, edit, and delete these goals and their members.

> 📝 **Note:** To access Financial Goals FlexCards, users need the Financial Services Cloud Extension and OmniStudio User permission sets.

To assign members to goals, users must do either or both of these things:

- Add the FinancialGoals FlexCard to their person account or household record page.
- Add the GoalMembers FlexCard to their Financial Goal record page.

FinancialGoals FlexCard

Displays the financial goals associated with an account. Add this FlexCard to a person account or household record page.

Data Source: GetGoalsBasedOnAccountRecordType Integration Procedure

Child FlexCard: Goal

Calls:

- Create action: CreateFinancialGoal OmniScript
- LoadMore action: GetFinancialGoalsForAccount Integration Procedure

Goal FlexCard

Displays details for one Financial Goal, plus Edit and Remove actions in a dropdown.

Data Source: Same as parent

Parent FlexCard: FinancialGoals

Calls:

- Edit action: EditFinancialGoal OmniScript
- Remove action: DeleteFinancialGoal OmniScript

GoalMembers FlexCard

Displays the number of members associated with a financial goal. Add this FlexCard to a financial goal record page.

Data Source: GetAllMembersForGoal Integration Procedure

Child FlexCard: GoalMemberList

Calls: Action: EditGoalMembers OmniScript

GoalMemberList FlexCard

Displays a table of members associated with a financial goal.

Data Source: Same as parent

Parent FlexCard: FinancialGoalMemberContainer

FinancialGoalsFundingHeader FlexCard

Display the header for financial goals that are funded by a financial account. Add this FlexCard to a Financial Account record.

Data Source: GetFinancialAccountAndFinancialGoalDetails Integration Procedure

Child FlexCard: FinancialGoalsFundingList

Calls: SaveFundingSource Integration Procedure (via saveupdatedlist Event Listener Action)

FinancialGoalsFundingList FlexCard

Display a list of the financial goals that are funded by a financial account.

Data Source: Same as parent

Parent FlexCard: FinancialGoalsFundingHeader

Integration Procedures for Financial Goals FlexCards

The Financial Goals FlexCards depend on the following Integration Procedures.

GetGoalsBasedOnAccountRecordType Integration Procedure

Retrieves all Financial Goal records related to the current Person Account or Household record.

Called By: FinancialGoals FlexCard

Calls:

- FSCGetRecordTypeOfAccount DataRaptor Extract

- fschousehold.FSCHouseholdService.getAllMembersOfAHousehold Apex class and method
- GetFinancialGoalsForAccount Integration Procedure
- FSCTransformPicklistValues DataRaptor Transform

GetFinancialGoalsForAccount Integration Procedure

Retrieves all Financial Goal records related to the current Person Account or Household record.

Called By:

- FinancialGoals FlexCard, LoadMore action
- GetGoalsBasedOnAccountRecordType Integration Procedure

Calls:

- FSCGetFinancialGoals DataRaptor Extract
- GetActionsForGoals Integration Procedure
- FSCAddActionsToGoalObject DataRaptor Transform

GetActionsForGoals Integration Procedure

Retrieves the Edit and Remove actions for each FinancialGoal FlexCard instance.

Called By: GetFinancialGoalsForAccount Integration Procedure

Calls:

- FSCGetActionsAccess DataRaptor Extract

GetAllMembersForGoal Integration Procedure

Retrieves all the members of a financial goal and adds details to the list of members.

Called By: GoalMembers FlexCard

Calls:

- GetMembersOfGoal Integration Procedure
- FSCReturnMembersInfoList DataRaptor Transform

GetMembersOfGoal Integration Procedure

Retrieves the members of a financial goal.

Called By:

- GetAllMembersForGoal Integration Procedure
- EditFinancialGoal OmniScript
- EditGoalMembers OmniScript

Calls:

- FSCGetGoalMembers DataRaptor Extract
- FSCCombineMembersInOneObject DataRaptor Transform

GetFinancialAccountAndFinancialGoalDetails Integration Procedure

Retrieve financial account details and associated financial goals details.

Called By: FinancialGoalsFundingHeader FlexCard

Calls

- fschousehold.FSCFinancialAccountService Apex class, isFinancialAccountMgmtPrefEnabled method
- fschousehold.FSCGoalService Apex class, FinancialGoalPriority method
- FSCSGetFinancialAccountDetail DataRaptor Extract
- FSCSGetFinancialGoalsForFinancialAccounts DataRaptor Turbo
- FSCTransformPicklistValues DataRaptor Transform
- FSCSGetFinancialAccountBalance DataRaptor Extract
- FSCAddAvailableBalance DataRaptor Transform
- FSCGetFinancialAccountDetail DataRaptor Extract
- FSCGetFinancialGoalsForFinancialAccounts DataRaptor Turbo
- FSCAddAvailableBalance2 DataRaptor Transform

SaveFundingSource Integration Procedure

Save financial goal funding source and amount.

Called By: FinancialGoalsFundingHeader FlexCard

Calls:

- fschousehold.FSCFinancialAccountService Apex class, isFinancialAccountMgmtPrefEnabled method
- FSCSSaveFinancialGoalFunding DataRaptor Load
- FSCSaveFinancialGoalFunding DataRaptor Load

DataRaptors for Financial Goals FlexCards

The Financial Goals FlexCards depend on the following DataRaptors.

FSCGetRecordTypeOfAccount DataRaptor Extract

Determines whether the type of the financial account is Person Account or Household.

Called By:

- GetGoalsBasedOnAccountRecordType Integration Procedure

FSCTransformPicklistValues DataRaptor Transform

Transforms the Status and Priority picklist values for display.

Called By:

- GetGoalsBasedOnAccountRecordType Integration Procedure
- GetFinancialAccountAndFinancialGoalDetails Integration Procedure

FSCGetFinancialGoals DataRaptor Extract

Retrieves all Financial Goal records related to the current Person Account or Household record.

Called By:

- GetFinancialGoalsForAccount Integration Procedure

FSCAddActionsToGoalObject DataRaptor Transform

Adds the Edit and Remove actions to each Financial Goal record for use in the Goal FlexCard instances.

Called By:

- GetFinancialGoalsForAccount Integration Procedure

FSCGetActionsAccess DataRaptor Extract

Checks whether the user has access to edit or delete actions for FinancialGoal and FinancialGoalParty objects.

Called By:

- GetActionsForGoals Integration Procedure

FSCReturnMembersInfoList DataRaptor Transform

Transforms member data into a list.

Called By:

- GetAllMembersForGoal Integration Procedure

FSCGetGoalMembers DataRaptor Turbo

Retrieves the members of a financial goal.

Called By:

- GetMembersOfGoal Integration Procedure

FSCCombineMembersInOneObject DataRaptor Transform

Combines member information into a single JSON object.

Called By:

- GetMembersOfGoal Integration Procedure

FSCSGetFinancialAccountDetail DataRaptor Extract

Retrieves details from a standard Financial Account object.

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCGetFinancialAccountDetail DataRaptor Extract

Retrieves details from a custom Financial Account object.

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCSGetFinancialGoalsForFinancialAccounts DataRaptor Turbo

Retrieves Financial Goals related to standard Financial Account objects.

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCGetFinancialGoalsForFinancialAccounts DataRaptor Turbo

Retrieves Financial Goals related to custom Financial Account objects..

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCSGetFinancialAccountBalance DataRaptor Extract

Retrieves the balance from a standard Financial Account object.

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCAddAvailableBalance DataRaptor Transform

Calculate the available account balance for financial goal funding. Subtracting the amount used to fund goals from the amount in the financial account.

Called By:

- GetFinancialAccountAndFinancialGoalDetails Integration Procedure
- GetGoalDetailsForFinancialAccount Integration Procedure

FSCSSaveFinancialGoalFunding DataRaptor Load

Saves a standard Financial Account record related to the current Financial Goal record..

Called By:

- SaveFundingSource Integration Procedure
- SaveFinancialGoalFunding Integration Procedure

FSCSaveFinancialGoalFunding DataRaptor Load

Saves a custom Financial Account record related to the current Financial Goal record.

Called By:

- SaveFundingSource Integration Procedure
- SaveFinancialGoalFunding Integration Procedure

Financial Goals OmniScripts and Related Components

The Financial Goals OmniScripts depend on child OmniScripts, embedded FlexCards, Integration Procedures, and DataRaptors to perform their functions.

Financial Goals OmniScripts

The Financial Goals OmniScripts implement the Add Goal button on the FinancialGoals FlexCard, the edit and delete items on the Goal FlexCard instances, and the Edit button on the GoalMembers FlexCard.

FlexCards for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following embedded FlexCards.

Integration Procedures for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following Integration Procedures.

DataRaptors for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following DataRaptors.

SEE ALSO:

Financial Plans and Goals FlexCards and Related Components

Financial Goals OmniScripts

The Financial Goals OmniScripts implement the Add Goal button on the FinancialGoals FlexCard, the edit and delete items on the Goal FlexCard instances, and the Edit button on the GoalMembers FlexCard.

CreateFinancialGoal OmniScript

Diplays a three-page process for creating a financial goal. Prompts for financial goal details, prompts for members and lets you search for them, then saves the goal details and member list.

Called By: FinancialGoals FlexCard, Create action

Calls:

- FinancialGoalDetails OmniScript
- FinancialGoalMembers OmniScript
- FinancialGoalFunding OmniScript
- SaveFinancialGoalsAndGoalParties Integration Procedure
- FSCCreateGoalFundingList DataRaptor Transform
- SaveFinancialGoalFunding Integration Procedure

EditFinancialGoal OmniScript

Displays a three-page process for editing a financial goal. Retrieves the goal details and member list, presents the details for editing, presents the member list for editing, then saves the goal details and member list.

Called By: Goal FlexCard, Edit action

Calls:

- GetGoalDetails Integration Procedure
- GetMembersOfGoal Integration Procedure (see Integration Procedures for Financial Goals FlexCards)
- FinancialGoalDetails OmniScript
- FinancialGoalMembers OmniScript
- FinancialGoalFunding OmniScript
- SaveFinancialGoalsAndGoalParties Integration Procedure
- FSCCreateGoalFundingList DataRaptor Transform
- SaveFinancialGoalFunding Integration Procedure

EditGoalMembers OmniScript

Presents a one-page process for editing financial goal members. Retrieves the member list, presents the member list for editing, then saves the edited member list.

Called By: GoalMembers FlexCard, Action action

Calls:

- GetMembersOfGoal Integration Procedure (see Integration Procedures for Financial Goals FlexCards)
- FinancialGoalMembers OmniScript
- SaveGoalPartyChanges Integration Procedure

FinancialGoalDetails OmniScript

Displays key Financial Goal fields and lets users enter or edit them.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript

Calls:

- fschousehold.FSCGoalService.FinancialGoalPriority Apex class and method
- fschousehold.FSCGoalService.FinancialGoalStatus Apex class and method

FinancialGoalMembers OmniScript

Lets users search for Person Accounts to add as members and displays any existing members. Also lets users remove members.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript
- EditGoalMembers OmniScript

Embeds:

- FSCMembersTableHeader FlexCard
- FSCMembersTableBody FlexCard

Calls:

- FSCSearchFinancialGoalMembers DataRaptor Extract
- GetNewMember Integration Procedure
- GetAddedAndDeletedMembers Integration Procedure

FinancialGoalFunding OmniScript

Associate a financial goal to a financial account.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript

Embeds: FinancialAccount FlexCard

Calls:

- GetAccountIds Integration Procedure
- GetActiveFinancialAccounts Integration Procedure

DeleteFinancialGoal OmniScript

Presents a confirmation prompt, then removes the financial goal using a Delete Action within the OmniScript.

Called By:

- Goal FlexCard, Remove action

FlexCards for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following embedded FlexCards.

FSCMembersTableHeader FlexCard

Displays the column headers in the goal members table.

Embedded By: FinancialGoalMembers OmniScript

FSCMembersTableBody FlexCard

Displays the member rows in the goal members table.

Embedded By: FinancialGoalMembers OmniScript

FinancialAccount FlexCard

Displays the Financial Account rows in the goal funding table.

Embedded By: FinancialGoalFunding OmniScript

Child FlexCard: FSCFinancialAccountDetails

Calls: FSCSaveFinancialAccount DataRaptor Transform (via selectfinancialaccount Event Listener Actions)

FSCFinancialAccountDetails FlexCard

Displays details for one Financial Account row in the goal funding table.

Data Source: GetGoalDetailsForFinancialAccount Integration Procedure

Parent FlexCard: FinancialAccount

Integration Procedures for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following Integration Procedures.

GetGoalDetails Integration Procedure

Retrieves financial goal details.

Called By:

- EditFinancialGoal OmniScript

Calles:

- FSCGetGoalDetails DataRaptor Extract

GetMemberDetails Integration Procedure

Retrieves financial goal member details.

Called By:

- CreateFinancialGoal OmniScript

Calls:

- FSCGetMemberInfo DataRaptor Extract

GetNewMember Integration Procedure

Retrieves a new financial goal member.

Called By:

- FinancialGoalMembers OmniScript

Calls:

- FSCConvertObjectToList DataRaptor Transform

GetAddedAndDeletedMembers Integration Procedure

Compiles two lists of members: one to be added to the financial goal and another to be deleted from it.

Called By:

- FinancialGoalMembers OmniScript

Calls:

- Nothing

GetAccountIds Integration Procedure

Retrieves Financial Account IDs from a list of goal members.

Called By:

- FinancialGoalFunding OmniScript

Calls:

- Nothing

GetActiveFinancialAccounts Integration Procedure

Filters the Financial Account list for active accounts.

Called By:

- FinancialGoalFunding OmniScript

Calls:

- fschousehold.FSCFinancialAccountService Apex class, isFinancialAccountMgmtPrefEnabled method
- FSCSGetAllFinancialAccounts DataRaptor Turbo
- FSCTransformBalanceToCurrency DataRaptor Transform
- FSCSGetFinancialAccountsForFinancialGoals DataRaptor Turbo
- FSCGetAllFinancialAccounts DataRaptor Turbo
- FSCGetFinancialAccountsForFinancialGoals DataRaptor Turbo

GetGoalDetailsForFinancialAccount Integration Procedure

Retrieves Financial Goal details for a Financial Account.

Called By:

- FSCFinancialAccountDetails FlexCard

Calls:

- fschousehold.FSCFinancialAccountService Apex class, isFinancialAccountMgmtPrefEnabled method
- FSCSGetFinancialGoalsForFinancialAccounts DataRaptor Turbo
- FSCSGetFinancialAccountDetail DataRaptor Extract
- FSCSGetFinancialAccountBalance DataRaptor Extract
- FSCSGetBranchUnitForFinancialAccount DataRaptor Extract
- FSCAddAvailableBalance DataRaptor Transform
- FSCSGetFinancialAccountOwners DataRaptor Turbo
- FSCGetFinancialGoalsForFinancialAccounts DataRaptor Turbo
- FSCGetFinancialAccountDetail DataRaptor Extract
- FSCGetFinancialAccountOwners DataRaptor Turbo

SaveFinancialGoalsAndGoalParties Integration Procedure

Creates a financial goal and references to members.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript

Calls:

- FSCSaveGoal DataRaptor Load
- FSCGetGoalPartyId DataRaptor Extract

- FSCSaveGoalParty DataRaptor Load

SaveFinancialGoalFunding Integration Procedure

Creates references between the Financial Goal and the Financial Accounts that fund it.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript

Calls:

- fschousehold.FSCFinancialAccountService Apex class, isFinancialAccountMgmtPrefEnabled method
- FSCGetFinancialAccountsForFinancialGoals DataRaptor Turbo
- FSCSGetFinancialAccountsForFinancialGoals DataRaptor Turbo
- FSCSSaveFinancialGoalFunding DataRaptor Load
- FSCSaveFinancialGoalFunding DataRaptor Load

SaveGoalPartyChanges Integration Procedure

Saves goal members after editing.

Called By:

- EditGoalMembers OmniScript

Calls:

- FSCGetGoalPartyId DataRaptor Extract
- FSCSaveGoalParty DataRaptor Load

DataRaptors for Financial Goals OmniScripts

The Financial Goals OmniScripts depend on the following DataRaptors.

FSCSearchFinancialGoalMembers DataRaptor Extract

Lets users search for Person Accounts to add to the financial goal member list.

Called By:

- FinancialGoalMembers OmniScript

FSCGetGoalDetails DataRaptor Extract

Retrieves a financial goal and its members.

Called By:

- GetGoalDetails Integration Procedure

FSCGetMemberInfo DataRaptor Extract

Retrieves name, household, and contact details for a member.

Called By:

- GetMemberDetails Integration Procedure

FSCConvertObjectToList DataRaptor Transform

Converts a single object to a single list item.

Called By:

- GetNewMember Integration Procedure

FSCSaveGoal DataRaptor Load

Saves a new or edited financial goal.

Called By:

- SaveFinancialGoalsAndGoalParties Integration Procedure

FSCSaveGoalParty DataRaptor Load

Saves a financial goal's reference to a member. (The Integration Procedure calls this DataRaptor once for each member.)

Called By:

- SaveFinancialGoalsAndGoalParties Integration Procedure
- SaveGoalPartyChanges Integration Procedure

FSCGetGoalPartyId DataRaptor Extract

Retrieves the ID of a removed member so its reference can be deleted. (The Integration Procedure calls this DataRaptor once for each removed member.)

Called By:

- SaveFinancialGoalsAndGoalParties Integration Procedure
- SaveGoalPartyChanges Integration Procedure

FSCCreateGoalFundingList DataRaptor Transform

Formats the list of Financial Accounts related to the Financial Goal.

Called By:

- CreateFinancialGoal OmniScript
- EditFinancialGoal OmniScript

FSCSaveFinancialAccount DataRaptor Transform

Transforms Financial Account data to a format in which it can be saved.

Called By:

- FinancialAccount FlexCard

FSCSGetAllFinancialAccounts DataRaptor Turbo

Retrieves all standard Financial Account objects.

Called By:

- GetActiveFinancialAccounts Integration Procedure

FSCGetAllFinancialAccounts DataRaptor Turbo

Retrieves all custom Financial Account objects.

Called By:

- GetActiveFinancialAccounts Integration Procedure

FSCTransformBalanceToCurrency DataRaptor Transform

Transforms a Financial Account balance from a number data type to a currency data type.

Called By:

- GetActiveFinancialAccounts Integration Procedure

FSCSGetFinancialAccountsForFinancialGoals DataRaptor Turbo

Retrieves standard Financial Account objects related to selected Financial Goals.

Called By:

- GetActiveFinancialAccounts Integration Procedure
- SaveFinancialGoalFunding Integration Procedure

FSCGetFinancialAccountsForFinancialGoals DataRaptor Turbo

Retrieves custom Financial Account objects related to selected Financial Goals.

Called By:

- GetActiveFinancialAccounts Integration Procedure
- SaveFinancialGoalFunding Integration Procedure

FSCSGetBranchUnitForFinancialAccount DataRaptor Extract

Retrieves the Branch Unit for a standard Financial Account object.

Called By:

- GetGoalDetailsForFinancialAccount Integration Procedure

FSCSGetFinancialAccountOwners DataRaptor Turbo

Retrieves the owner of a standard Financial Account object.

Called By:

- GetGoalDetailsForFinancialAccount Integration Procedure

FSCGetFinancialAccountOwners DataRaptor Turbo

Retrieves the owner of a custom Financial Account object.

Called By:

- GetGoalDetailsForFinancialAccount Integration Procedure

Groups (Householding)

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

A group can give insight into a customer's financial circles, such as a household with its family members and professional connections. A group can also give you a view of your customers in other contexts. For example, you can group customers by the services that you provide them, your top ten customers, customers buying a house, and customers with more than a particular AUM.

> **Note:** Record rollups work by updating the Household field on child object records. This update can change the Last Modified By and Last Modified Date fields. To avoid updating these fields, select **Update Records Silently** when configuring record roll up. When this setting is selected, child records are updated without updating the Last modified by and Last modified date fields.

Set Up Relationship Groups

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

Create Expanded Account Relationships in Group Builder

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

Configure the Group Builder Edit Window

In the Group Builder Edit window, view, create, and update the records that are part of a household group.

Customize Roles for Person Accounts and Individuals

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

Configure Reciprocal Roles

Within a relationship, a reciprocal role describes the role of one entity relative to another entity. For example, Client and Power of Attorney, or Proprietor and Business. We've provided a set of commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of attorneys, or various professional affiliations.

SEE ALSO:

Record Rollups

Set Up Relationship Groups

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

Enable Multiple Relationship Groups

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

Components That Visualize Groups and Relationships

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

Enable Multiple Relationship Groups

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

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

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

Components That Visualize Groups and Relationships

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

Table 15: Financial Services Components That Visualize Groups and Relationships

Component	Description	Type
ARC - Financial Services Cloud	Renders the Actionable Relationship Center hierarchy for an account or contact. Use at person and group levels.	Standard
Group Members (Configurable) - Financial Services Cloud	Displays relationship group members, associated information, and task subtypes in a compact grid. To customize the member details displayed, use a custom Account field set. Use at person and group levels.	Custom
Group Members - Financial Services Cloud	Displays relationship group members and age, phone, mobile, email, next and last interaction dates, and task subtypes in a list. Use at person and group levels.	Custom
Related Account - Financial Services Cloud	Displays related accounts for a person or a group. Displays Account Contact Relationships on a person's page and Account Account Relationships on a group's page.	Custom
Related Contact - Financial Services Cloud	Displays Account Contact Relationships for a person or group. 📝 **Note:** This component doesn't display standard contacts that look up to accounts. The standard Contacts related list displays contacts that look up to accounts.	Custom
Relationship Group List - Financial Services Cloud	Displays a person's groups and group members as a related list. Use at the person	Custom

Component	Description	Type
	level. Create and customize the WM_Client_Relationship_Groups Account field set to control what fields the top section of the component displays. Create and customize the WM_Client_Relationship_Group_Members Contact field set to control what fields the first subsection of the component displays. Create and customize the WM_Client_Relationship_Group_Members Account field set to control what fields the second subsection of the component displays.	
Relationship Map - Financial Services Cloud	Displays a visual model of relationships for accounts, contacts, and individuals. Use at person and group levels.	Custom

[Control Who Sees What on the Relationship Map and in Group Builder](#)

Provide the right level of detail on the Relationship Map and Group Builder based on users' roles, such as advisor, banker, or teller. Edit Lightning pages to show or hide Related Accounts and Related Contacts.
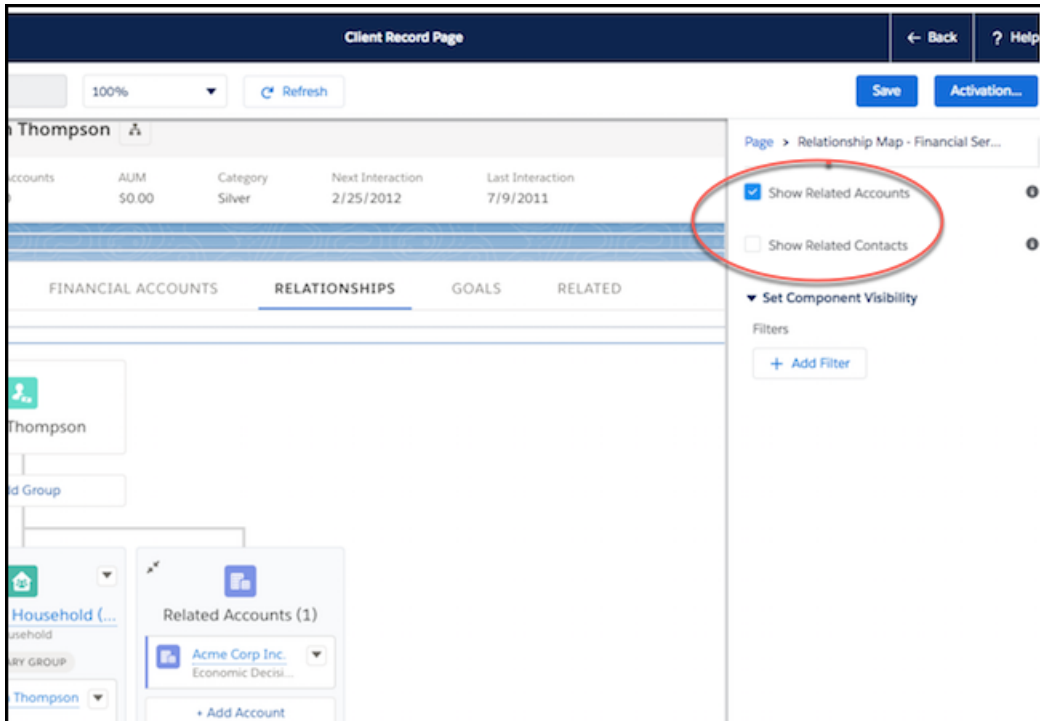
[Customize Field Sets for the Relationship Group List Component](#)

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

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

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

SEE ALSO:

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

[View Preconfigured ARC Relationship Graphs for Financial Services Cloud (Original ARC)](#)

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

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

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

1. From Setup, in the Quick Find box, enter `App Builder`, and then select **Lightning App Builder**.

2. Select **Edit** next to the Lightning page you want to modify, such as the Client Record Page. Or create a page to assign to your users.

3. Select the **Relationships** tab and click **Relationship Map**. Or drag the **Relationship Map** component onto the page.

4. In the right panel, **Show Related Accounts** and **Show Related Contacts** are enabled by default. To hide **Related Accounts** or **Related Contacts**, deselect the appropriate checkbox.

5. Save your changes.

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

SEE ALSO:

Salesforce Help: Activate Lightning Experience Record Pages

Customize Field Sets for the Relationship Group List Component

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

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

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

Customize the Relationship Group List Component's Account Details

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

Customize the Relationship Group List Component's Contact Details

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

Customize the Relationship Group List Component's Group Detail

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

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

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

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

1. From Setup, open **Object Manager**.

2. Click **Account**, and then select **Field Sets**.

3. To create the field set:

   a. Click **New**.

   b. Enter the **Field Set Label** `Relationship Groups`.

   c. Enter the **Field Set Name** `WM_Client_Relationship_Groups`.

   d. For **Where is this used?**, enter `Client profile's Relationships tab`.

   e. Save your changes.

   f. Skip to step 5.

4. To edit the field set:

   a. In the Quick Find box, enter the API name of the field set to edit.

   b. Click the field label for the field set to edit.

5. Drag the fields that you want to display from the object palette to the **In the Field Set** container.

a. Drag the **Account Name, Last Interaction** and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

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

b. Select **Record Type Id** in the object palette. Then drag the **Name** field from the object palette to the **In the Field Set** container.

c. Add any additional fields you want to display for each group in the Relationship Group List - Financial Services Cloud custom component.

6. To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.

7. Click **Save** on the object palette.

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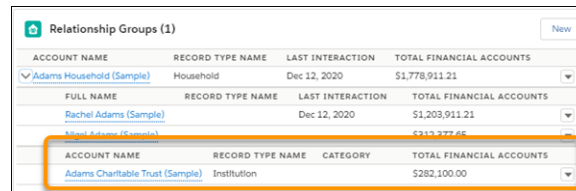
Create or edit the WM_Client_Relationship_Group_Members Account field set to customize the second subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile's Relationships tab.

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

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

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

1. From Setup, open **Object Manager**.

2. Click **Account**, and then select **Field Sets**.

3. To create the field set:

a. Click **New**.

b. Enter the **Field Set Label** `Relationship Group Members`.

c. Enter the **Field Set Name** `WM_Client_Relationship_Group_Members`.

d. For **Where is this used?**, enter `Client profile's Relationship Group's table`.

e. Save your changes.

f. Skip to step 5.

4. To edit the field set:

a. In the Quick Find box, enter the API name of the field set to edit.

b. Click the field label for the field set to edit.

5. Drag the fields that you want to display from the object palette to the **In the Field Set** container.

a. Drag the **Account Name, Category**, and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

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

b. Select **Record Type Id** in the object palette.

c. Drag the **Name** field from the object palette to the **In the Field Set** container.

d. Click **Save** on the object palette.

e. Add any additional fields that you want to display for Account group members in the Relationship Group List component.

6. To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.

7. Click **Save** on the object palette.

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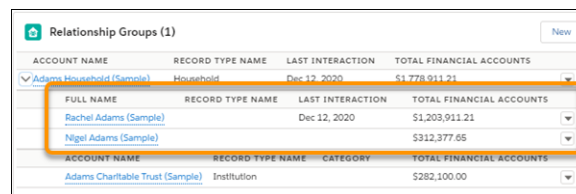
Create or edit the WM_Client_Relationship_Group_Members Contact field set to customize the first subsection of the expanded view of the Relationship Group List - Financial Services Cloud component. The component is displayed on a person account or individual profile's Relationships ta Pub /templateb.

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

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

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

1. From Setup, open **Object Manager**.

2. In the Quick Find box, type `contact`, and then click **Contact**.

3. Select **Field Sets**, and then click **New**.

4. To create the field set:

a. Click **New**.

b. Enter the **Field Set Label** `Relationship Group Members`.

    c. Enter the **Field Set Name** *WM_Client_Relationship_Group_Members*.

    d. For **Where is this used?**, enter *Client profile's Relationship Group's table*.

    e. Save your changes.

    f. Skip to step 6.

5. To edit the field set:

    a. In the Quick Find box, enter *WM_Client_Relationship_Group_Members*.

    b. Click the field label for Relationship Group Members.

6. Drag the fields that you want to display from the object palette to the **In the Field Set** container.

    a. Drag the **Name** field from the object palette to the **In the Field Set** container.

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

    b. Select **Record Type Id** in the object palette.

    c. Drag the **Name** field from the object palette to the **In the Field Set** container.

    d. Select **Account Id** in the object palette.

    e. Drag the **Last Interaction** and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

    f. Add any additional fields that you want to display for Contact group members in the Relationship Group List component.

7. To delete fields from the field set, hover over the field in the Field Set container, and click the minus icon.

8. Click **Save** on the object palette.

Set Up Group Member (Configurable) Component

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

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

Create a custom field set that includes information about group members to display in the Group Member (Configurable) component on the Relationships tab of an individual's profile. The fields in the field set are displayed only for group members that are person accounts. The fields aren't displayed for business accounts.

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

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

[Update the Edit Button on the Group Members and Details Component](#)

Give users access to your custom household management business process by creating a custom action that replaces the default edit button on the Group Members and Details component with a link to your business process. During configuration, you can also prevent inadvertent navigation to the default business process by hiding the record actions menu in group member cards.

Create a Field Set for Group Member (Configurable) Component

Create a custom field set that includes information about group members to display in the Group Member (Configurable) component on the Relationships tab of an individual's profile. The fields in the field set are displayed only for group members that are person accounts. The fields aren't displayed for business accounts.

1. From Setup, open **Object Manager**.

2. Click **Account**, and then select **Field Sets**.

3. Click **New**.

4. Enter a **Field Set Label** for your custom field set. For example, enter `Group Member Details`.

5. Enter a **Field Set Name**. For example, enter `WM_Client_Groups_Member_Details`.

6. In **Where is this used?**, enter `Client profile's Relationships tab` if you plan to use this field set with the Group Members (Configurable) component.

7. Save your changes.

8. Drag the fields that you want to display on each group member card from the object palette to the **In the Field Set** container.

   a. For example, drag the **Account, Category**, and **Total Financial Accounts** fields from the object palette to the **In the Field Set** container.

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

   b. To add fields from objects other than Account, click the name of the object in the object palette, and then drag the desired fields to the **In the Field Set** container. For example, select **Record Type Id** in the object palette. Then drag the **Name** field from the object palette to the **In the Field Set** container.

9. Click **Save** on the object palette.

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

SEE ALSO:

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

Customize the Group Members (Configurable) Component

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

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

1. From Setup, in the Quick Find box, enter `App Builder`, and then select **Lightning App Builder**.

2. Next to the Client Record Page click **Clone**. Label and save your custom client record page.

3. Next to the Client Record Page click **Edit**.

4. From the Lightning App Builder, on the client record page, click the **Relationships** tab.

5. Drag the **Group Members (Configurable)** component to the client record page under the relationship map component.
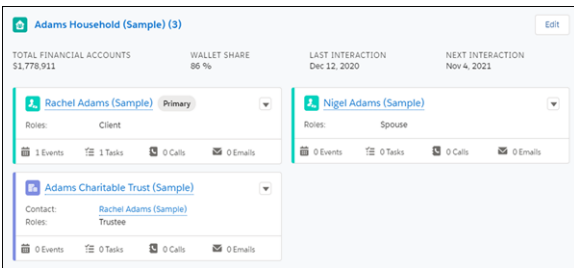
6. Enter the field set name in the Group Members (Configurable) component's Field Set textbox. For example, enter *WM_Client_Group_Member_Details*.

7. (Optional) Deselect **Show group activity roll-ups** to hide group activity rollups on each card.
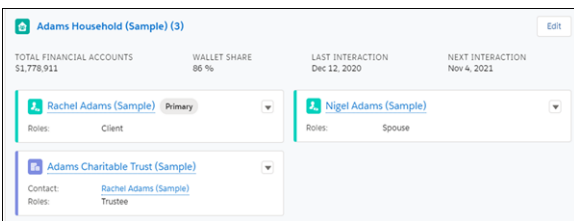
8. Select the existing **Group Members** component and delete it.

9. Save your changes.

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

SEE ALSO:

Create a Field Set for Group Member (Configurable) Component

Salesforce Help: Lightning App Builder

Update the Edit Button on the Group Members and Details Component

Give users access to your custom household management business process by creating a custom action that replaces the default edit button on the Group Members and Details component with a link to your business process. During configuration, you can also prevent inadvertent navigation to the default business process by hiding the record actions menu in group member cards.

📝 **Note:** Your custom household management business process must be created using Aura to show it in the Group Members and Details component.

1. Create a custom label for the button that replaces the edit button on the Group Members and Details component.

  a. From Setup, in the Quick Find box, enter *Custom Labels*, and then click **Custom Labels**.

  b. Click **New Custom Label**.

   c. Enter a Short Description.

   d. Enter a Name.

   e. Enter a Value for the new name of the edit button. For example, enter `Custom Household Business Process`.

   f. Save your changes.

2. To enable the button, configure the Group Member Setting.

   a. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then click **Custom Metadata Types**.

   b. Click **Manage Records** next to Group Member Setting.

   c. Click **New** to create a new record or edit an existing record if you have one.

   d. Select **Hide Record Actions**.

   e. Enter your custom button name in the Edit Button Custom Name field. This value extracts the new custom label value.

   f. Enter your custom component name in the Edit Component Name field. This value points the button to your custom household management business process.

   g. Save your changes.

SEE ALSO:

   Salesforce Help: Aura Components

Create Expanded Account Relationships in Group Builder

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

Enable Management of the Group's Relationships with Other Groups

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

Set Up Association Types

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

Enable Field-Level Security for the Association Type Field

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

Add the Association Type Field to Page Layouts

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

Enable Management of the Group's Relationships with Other Groups

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

Before you set up this feature, review these considerations:

- When the Enable Relationship Group Hierarchy feature flag setting is active, when you create an Account-Account relationship with association type Group, the inverse Account-Account relationship association type record is Member.

- When the Enable Relationship Group Hierarchy feature flag setting is active, when you create an Account-Account relationship with association type Member, the inverse Account-Account relationship association type record is Group.

- When the Enable Relationship Group Hierarchy feature flag setting is disabled, when you create an Account-Account relationship with association type Member, the inverse Account-Account relationship association type record is Member.

- When the Enable Relationship Group Hierarchy feature flag setting is disabled, when you create an Account-Account relationship with association type Group, the inverse Account-Account relationship association type record is Group.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Select **Manage Records** for Feature Flag Settings.

3. Select **Edit** for the **Enable Relationship Group Hierarchy** custom metadata type.

4. Select Active and then save your changes.

   📝 Note: If you don't see the Active checkbox, add it to the page layout of Feature Flag Setting.

SEE ALSO:

Update the Feature Flag Setting Page Layout

Set Up Association Types

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

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

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

1. From Setup, select **Object Manager**.

2. Click the **Account-Account Relationship** object.

3. Click **Fields & Relationships** in the left-hand menu.

4. Click **Association Type**.

5. In the Values section, verify that the three required entries with the API Names **Group**, **Member**, and **Peer** are listed.

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

6. (Optional) Create other descriptive Association Type values as needed.

   a. In the **Values** section, click **New**.

   b. Enter one or more new picklist values into the text area, then click **Save**.

Enable Field-Level Security for the Association Type Field

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

1. From Setup, select **Object Manager**.

2. Select **Account-Account Relationship**.

3. Select **Fields & Relationships**, then select **Association Type**.

4. Select **Set Field-Level Security**.

5. Select **Visible** for all applicable user profiles, such as System Administrator, Advisor, Personal Banker, and Relationship Manager.

6. Save your changes.

Add the Association Type Field to Page Layouts

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

1. From Setup, select Object Manager.

2. Select **Account-Account Relationship**.

3. Select **Page Layouts**, then select **Account-Account Relationship Layout**.

4. From the palette, drag the Association Type field onto the page layout.

5. Save your changes.

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

Configure the Group Builder Edit Window

In the Group Builder Edit window, view, create, and update the records that are part of a household group.

To show the Group Builder Edit window, click the Edit button on the Group Members (Configurable) - Financial Services Cloud component, Group Members - Financial Services Cloud component, Relationship Group List - Financial Services Cloud component, or the Relationship Map - Financial Services Cloud component.

Configure the window to show up to four sections:

Who are the members of this group?

Shows the members that are part of the group.

Account Contact Relationship object.

This section is always shown in the window.

How is this group related to other groups?

Shows other groups that are related to this group.

Account-Account Relationship object.

Do the members have relationship with other accounts?

Shows the relationships of the contacts of this group with other accounts.

Account Contact Relationship object.

Do the members have relationships with other people?

Shows the relationships of the contacts of the group with other contacts.

Contact-Contact Relationship object.

To let your users manage different relationships in a household group, show or hide sections in the window. Create field sets to show fields that are the most relevant to your users.

Update the Feature Flag Setting Page Layout

Financial Services Cloud offers advanced features to improve performance and workflow. You'll find these features grouped under Feature Flag Setting in the Custom Metadata Types page. Use these settings to customize your org for your business needs. Add the Active checkbox to the Feature Flag Setting page layout.

Enable Management of Member Relationships with Other Accounts

Use the Enable Relationships with other Accounts custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation. Select the Active checkbox to show the Do the members have relationships with other accounts? section of the Group Builder Edit window.

Enable Management of the Member's Relationships with Other People

Use the Enable Relationships with Other People custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation. Select the Active checkbox to show the Do the members have relationships with other people? section of the Group Builder Edit window.

Create Field Sets for the Group Builder Edit Window

Configure the fields that show in the Group Builder Edit window.

Update the Field Sets in the Group Builder Edit Window

Customize the field set that show in the Group Builder Edit window.

Add the Edit Group Record Action to an Account Node in ARC

Customize the ARC Relationship Graph Component with a record action to open the Group Builder Edit window on Account nodes.

Update the Feature Flag Setting Page Layout

Financial Services Cloud offers advanced features to improve performance and workflow. You'll find these features grouped under Feature Flag Setting in the Custom Metadata Types page. Use these settings to customize your org for your business needs. Add the Active checkbox to the Feature Flag Setting page layout.

Feature Flag Setting	Description
Enable Enhanced Error Handling	Prevents silent failure of validation rules during trigger execution.
Enable Primary Contact after Undelete	Applicable to Individual accounts. When you restore a deleted Individual account from the org's recycle bin, this setting resets that account as the primary contact.
Enable Relationship Group Hierarchy	Enables the creation of expanded account hierarchies for groups. For example, adding a subsidiary to a parent company or a household to another household.
Enable Relationships with other Accounts	When active, shows the Do the members have relationships with other accounts? section of the Group Builder Edit window.
Enable Relationships with other People	When active, shows the Do the members have relationships with other people? section of the Group Builder Edit window.
Query Optimization	Optimizes querying capabilities for orgs with large data sets and provides a database query performance gain of 40–60%. Auto-enabled for new package installations starting Winter '21.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Select **Feature Flag Setting**.

3. Click **Edit** for Feature Flag Setting Layout.

4. Drag the Active field from the palette to the Information section.

5. Save your changes.

Enable Management of Member Relationships with Other Accounts

Use the Enable Relationships with other Accounts custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation. Select the Active checkbox to show the Do the members have relationships with other accounts? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Select **Manage Records** for Feature Flag Settings.

3. Select **Edit** for the Enable Relationships with other Accounts custom metadata type.

4. Select **Active** to show the Do the members have relationships with other accounts? section of the Group Builder Edit window.

5. Save your changes.

   📝 Note: If you don't see the Active checkbox, add it to the page layout of Feature Flag Setting.

Enable Management of the Member's Relationships with Other People

Use the Enable Relationships with Other People custom metadata types to enable expanded relationship group hierarchies and relationship cyclic validation. Select the Active checkbox to show the Do the members have relationships with other people? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Select **Manage Records** for Feature Flag Settings.

3. Select **Edit** for the Enable Relationships with other People custom metadata type.

4. Select **Active** to show the 'Do the members have relationships with other people?' of the group builder edit window.

5. Save your changes.

   📝 **Note:** If you don't see the Active checkbox, add it to the page layout of Feature Flag Setting.

SEE ALSO:

Create Field Sets for the Group Builder Edit Window

Configure the fields that show in the Group Builder Edit window.

Create a Field Set for the Who Are the Members of This Group? Section

Customize the fields that show in the Who are the members of this group? section of the Group Builder Edit window.

Create a Field Set for the How Is This Group Related to Other Groups? Section

Customize the fields that show in How is this group related to other groups?section of the Group Builder Edit window.

Create a Field Set for the Do the Members Have a Relationships with Other Accounts? Section

Customize the fields that show in the Do the members have a relationship with other accounts? section of the Group Builder Edit window.

Create a Field Set for the Do the Members Have Relationships with Other People? Section

Customize the fields that show in the Do the members have relationships with other people? section of the Group Builder Edit window.

Create a Field Set for the Who Are the Members of This Group? Section

Customize the fields that show in the Who are the members of this group? section of the Group Builder Edit window.

Group Members is the default field set for the 'Who are the members of this group?' section of the Group Builder Edit window. To view and update the default field set you must have the Unmanaged Extension Package installed in your Salesforce org. Refer to the Install the Unmanaged Extension Package document for more details.

You can create new field sets for the 'Who are the members of this group?' section of the Group Builder Edit window without the Unmanaged Extension Package.

1. From Setup, select **Object Manager**.

2. Click **Account Contact Relationship**.

3. Click **Field Sets**, and then **New**.

4. Enter a **Field Set Label**, **Field Set Name**, and add information in the **Where is this Used?** box.

Account Contact Relationship Field Set
New Field Set

Field Set Edit   Save   Cancel

Enter Field Set information

Field Set Label	Custom members field set
Field Set Name	Custom_members_field_se
Namespace Prefix	fscwmmain
Where is this used?	'Who are the members of this group?' section of the Group Builder Edit window,

Save   Cancel

5. Click **Save**.

6. Drag the fields that you want listed in the field set from the palette to the list.

7. Save your changes.

8. Make a note of the Field Set API Name. You need the API name to add the field set to a section in the Group Builder Edit window.

Field Set field limitations:

- You can't add the following fields in the Group Builder Edit window:

  - Account

  - Account Contact Relationship ID

  - Active

  - Created By

  - Created Date

  - Deleted

  - Direct

- – Last Modified By

- – Last Modified Date

- – Source System ID

- – System Modstamp

- • You can add fields only from Account Contact Relationship object.

- • You can't add fields from other objects like Account and Contact.

- • Contact field must be added to the field set. If it is not added, it shows in the Group Builder Edit window as the last column.

- • You can't add custom fields Time, Text (Encrypted), or Formula.

SEE ALSO:

Install the Unmanaged Extension Packages

Salesforce Help: About Field Sets

Create a Field Set for the How Is This Group Related to Other Groups? Section

Customize the fields that show in How is this group related to other groups?section of the Group Builder Edit window.

Relationships with other Groups is the default field set for the How is this group related to other groups? section of the Group Builder Edit window. To view and customize the default field set you must have the Unmanaged Extension Package installed in your Salesforce org. For more information, see Install the Unmanaged Extension Package..

To create new field sets for the How is this group related to other groups? section of the Group Builder Edit window you don't need the Unmanaged Extension Package.

1. From Setup, select **Object Manager**.

2. Click **Account Account Relationship**.

3. Click **Field Sets**, and then **New**.

4. Enter a Field Set Label, Field Set Name, and Where is this Used?

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To view the Group Builder Edit window
- • Financial Services Cloud Extensions

5. Click **Save**.

6. Drag the fields that you want listed in the field set from the palette to the list. .

7. Save your changes.

8. Make a note of the Field Set API Name. You need the API name to add the field set to a section in the Group Builder Edit window.

Field Set field limitations:

- You can't add the following fields in the Group Builder Edit window:

    – Account

    – Account Contact Relationship ID

    – Account Relation Name

    – Active

    – Created By

    – Created Date

    – Deleted

    – External ID

    – InverseRelationship

    – Last Modified By

    – Last Modified Date

    – Owner

    – Record ID

    – Source System ID

    – System Modstamp

- You can add fields only from Account Account Relationship object.

- You can't add fields from other objects like Account and Contact.

- Contact field must be added to the field set. If it is not added, it shows in the Group Builder Edit window as the last column.

- You can't add custom fields Time, Text (Encrypted), or Formula.

SEE ALSO:

Install the Unmanaged Extension Packages

Salesforce Help: About Field Sets

Create a Field Set for the Do the Members Have a Relationships with Other Accounts? Section

Customize the fields that show in the Do the members have a relationship with other accounts? section of the Group Builder Edit window.

Relationships with Other Accounts is the default field set for the Do the members have relationships with other accounts? section of the Group Builder Edit window. To view and customize the default field set you must have the Unmanaged Extension Package installed in your Salesforce org. For more information, see Install the Unmanaged Extension Package.

To create new field sets for the Do the members have relationship with other accounts? section of the Group Builder Edit window, you don't need the Unmanaged Extension Package.

1. From Setup, select **Object Manager**.

2. Click **Account Contact Relationship**.

3. Click **Field Sets**, and then **New**.

4. Enter a **Field Set Label**, **Field Set Name**, and provide information in the **Where is this Used?** box.

Account Contact Relationship Field Set
New Field Set

Field Set Edit	Save Cancel

Enter Field Set information

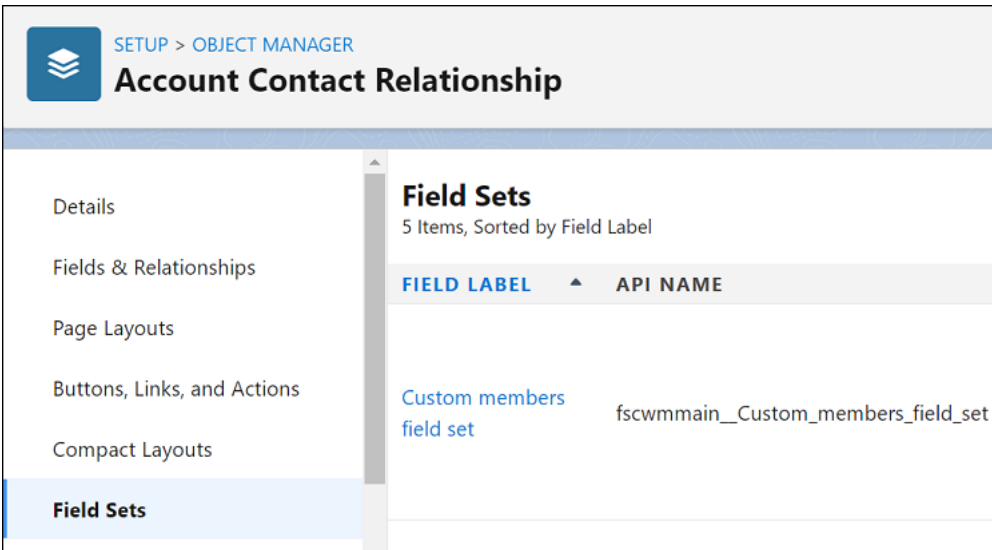| Field Set Label	Custom rel other accounts f
Field Set Name	Custom_rel_other_account:
Namespace Prefix	fscwmmain
Where is this used?	'Do the members have a relationship with other accounts?' section of the Group Builder Edit window.

Save   Cancel

5. Click Save.

6. Drag the fields that you want listed in the field set from the palette to the list.

7. Save your changes.

8. Make a note of the Field Set API Name. You need the API name to add the field set to a section in the Group Builder Edit window.

   Field Set field limitations:

   - You can't add the following fields in the Group Builder Edit window:

     – Account Contact Relationship ID

     – Active

     – Created By

     – Created Date

     – Deleted

     – Direct

     – Last Modified By

     – Last Modified Date

     – Source System ID

     – System Modstamp

   - You can add fields only from Account Contact Relationship object.

   - You can't add fields from other objects like Account and Contact.

   - Contact and Account field must be added to the field set. If it is not added, it will show in the Group Builder Edit window as the last column.

   - You can't add custom fields Time, Text (Encrypted), or Formula.

SEE ALSO:

Install the Unmanaged Extension Packages

Salesforce Help: About Field Sets

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Create a Field Set for the Do the Members Have Relationships with Other People? Section

Customize the fields that show in the Do the members have relationships with other people? section of the Group Builder Edit window.

Relationships with Other People is the default field set for the Do the members have relationships with other people? section of the Group Builder Edit window. To view and customize the default field set you must have the Unmanaged Extension Package installed in your Salesforce org. or more information, see Install the Unmanaged Extension Package.

To create new field sets for the o the members have relationships with other people? section of the Group Builder Edit window you don't need the Unmanaged Extension Package.

1. From Setup, select **Object Manager**.

2. Click **Contact-Contact Relationship**.

3. Click **Field Sets**, and then **New**.

4. Enter a **Field Set Label**, **Field Set Name**, and provide information in the **Where is this Used?** box.

Contact-Contact Relationship Field Set
New Field Set

Field Set Edit	Save Cancel

Enter Field Set information

Field Set Label	Custom rel other people fiel
Field Set Name	Custom_rel_other_people_
Namespace Prefix	fscwmmain
Where is this used?	'Do the members have relationships with other people?' section of the Group Builder Edit window.

Save   Cancel

5. Click Save.

6. Drag the fields that you want listed in the field set from the palette to the list.

7. Save your changes.

8. Make a note of the Field Set API Name. You need the API name to add the field set to a section in the Group Builder Edit window.

   Field Set field limitations:

   - You can't add the following fields in the Group Builder Edit window:

     – Account
     – Contact Relation Name
     – Created By
     – Created Date
     – Deleted
     – External ID
     – InverseRelationship
     – Last Modified By
     – Last Modified Date
     – Owner
     – Record ID
     – Source System ID
     – System Modstamp

   - You can add fields only from Account Contact Relationship object.

   - You can't add fields from other objects like Contact.

   - Contact, Related Role, and Related Contact field must be added to the field set. If it is not added, it shows in the Group Builder Edit window as the last column.

   - You can't add custom fields Time, Text (Encrypted), or Formula.

- You can't add custom Lookup fields (Lookup Relationship, Master-Detail Relationship, External Lookup Relationship).

SEE ALSO:

Install the Unmanaged Extension Packages

Salesforce Help: About Field Sets

Update the Field Sets in the Group Builder Edit Window

Customize the field set that show in the Group Builder Edit window.

Update the Field Sets for the How is this group related to other groups? Section

Customize the field sets that shows in How is this group related to other groups? section of the Group Builder Edit window.

Update the Field Set for the Who are the members of this group? Section

Customize the field set that shows in Who are the members of this group? section of the Group Builder Edit window.

Update the Field Sets for the Do the Members Have Relationships with Other Accounts? Section

Customize the field sets that show in the Do the members have relationships with other accounts? section of the Group Builder Edit window.

Update the Field Sets for the Do the Members have Relationships with Other People? Section

Customize the field sets that show in Do the members have relationships with other people? section of the Group Builder Edit window.

Update the Field Sets for the How is this group related to other groups? Section

Customize the field sets that shows in How is this group related to other groups? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Click **Manage Records** for Group Builder Field Sets.

3. Click **Edit** for Group Members to update the field set for 'Who are the members of this group?' section of the Group Builder Edit window.

4. In the Field Set Name field, enter the Field Set API Name you created in the previous step.

5. Click **Save**.

Update the Field Set for the Who are the members of this group? Section

Customize the field set that shows in Who are the members of this group? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Click **Manage Records** for Group Builder Field Sets.

3. Click **Edit** for Group Members to update the field set for 'Who are the members of this group?' section of the Group Builder Edit window.

4. In the Field Set Name field, enter the Field Set API Name you created in the previous step.

5. Click **Save**.

Update the Field Sets for the Do the Members Have Relationships with Other Accounts? Section

Customize the field sets that show in the Do the members have relationships with other accounts? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Click **Manage Records** for Group Builder Field Sets.

3. Click **Edit** for Group Members to update the field set for Do the members have relationship with other accounts? section of the Group Builder Edit window.

4. In the Field Set Name field, enter the Field Set API Name you created in the previous step.

5. Click **Save**.

Update the Field Sets for the Do the Members have Relationships with Other People? Section

Customize the field sets that show in Do the members have relationships with other people? section of the Group Builder Edit window.

1. From Setup, in the Quick Find box, enter `Custom Metadata`, and then select **Custom Metadata Types**.

2. Click **Manage Records** for Group Builder Field Sets.

3. Click **Edit** for the Do the members have relationships with other people? section of the Group Builder Edit window.

4. In the Field Set Name field, enter the Field Set API Name you created in the previous step.

5. Click **Save**.

Add the Edit Group Record Action to an Account Node in ARC

Customize the ARC Relationship Graph Component with a record action to open the Group Builder Edit window on Account nodes.

To show the Group Builder Edit window on an ARC Relationship Graph, the Account record type must be Group. For example, Household is a Group record type. Use the Group Record Type Mapper to set Accounts to record type Group.

1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.

2. Click **New Relationship Graph** or edit an existing graph.

3. Create a new Account node or select an existing Account node.

    You can add the Group Builder Edit action only to Account nodes. And you can't add the Group Builder Edit action to the root node.

4. Configure the field on the Properties tab and the Display tab.

5. Click the **Actions** tab.

6. In Record Actions, click **Select an Item** and select **Edit Group**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To view the Group Builder Edit window on an ARC Relationship Graph
• Financial Services Cloud Extensions
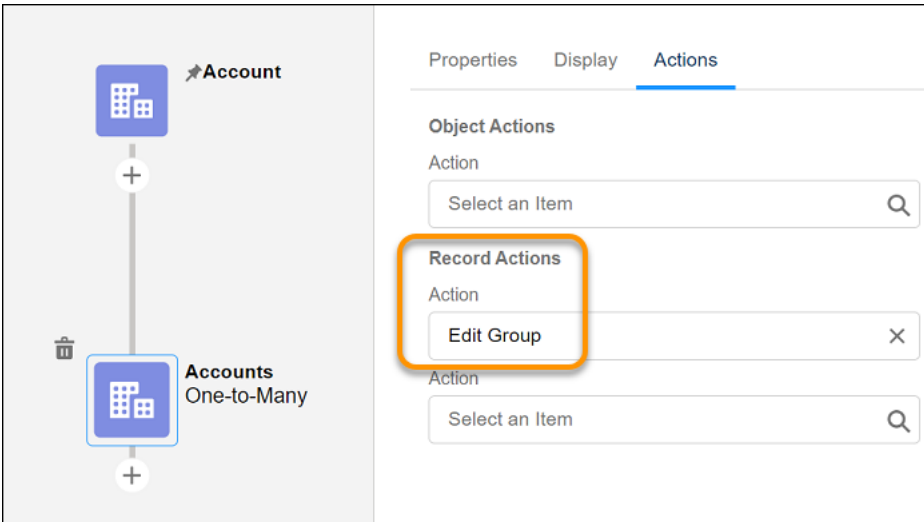
7. Save your changes.

Customize Roles for Person Accounts and Individuals

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

1. From Setup in Object Manager, open **Account Contact Relationships**, and then **Fields & Relationships**.

2. Select **Roles**.

3. Add or delete roles as needed.

4. Save your changes.

Configure Reciprocal Roles

Within a relationship, a reciprocal role describes the role of one entity relative to another entity. For example, Client and Power of Attorney, or Proprietor and Business. We've provided a set of commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of attorneys, or various professional affiliations.

1. From the App Launcher, find and open the Reciprocal Roles tab.

2. From the list view dropdown menu, select **All** to view the reciprocal roles. The roles provided are:

Role	Inverse Role
Accountant	Client
Business	Proprietor

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

3. Edit these reciprocal roles as needed. If you add a reciprocal role record and select **Create Inverse Role**, Salesforce creates a corresponding record that has the values for Role and Inverse swapped.

> **Note:** The predefined reciprocal roles are available only in English.

SEE ALSO:

Salesforce Help: Configure Reciprocal Roles

What Is a Relationship?

Intelligent Document Automation for Consent and Disclosures

Manage consent and disclosure documents, generate authorization request forms, and track user responses by using Intelligent Document Automation features.

Consent and disclosure authorizations are important steps in many business processes. Examples of consent documents include annual privacy policies, or disclosure statements about the sharing of financial data.

Consent is the explicit permission granted by a customer to a financial services company in order to perform a specific action on their behalf. A disclosure is any information a financial services company is required by regulations to give to a customer which describes key product functionality, terms, or conditions.

The Intelligent Document Automation data model includes objects that support consent and disclosure management.

Table 16: Intelligent Document Automation Objects

Object Name	Description
Authorization Form	Represents a form used to present the appropriate information to a person in order to ask for their consent.
Authorization Form Consent	Identifies whether a person consents to an information authorization request form, and captures information about when and how consent was given.
Authorization Form Data Use	Defines the forms that can be used to fulfill a data use purpose.
Authorization Form Text	Represents the text, or a link to the text, of an authorization form for a specific language and time period.
Authorizable Form Request Record	Links a record, such as an account or financial account, to an instance of an authorization form presented to a person for their consent.
Data Use Legal Basis	Identifies a regulation or policy that governs consent and disclosure requirements.
Data Use Purpose	Defines a reason for collecting consent and disclosure information.
Digital Signature	Represents an instance of a person's signature that's captured electronically and used to indicate their consent.
Info Authorization Request	Represents a request made to a person to consent to one or more authorization forms.
Info Authorization Request Form	Represents an instance of an authorization form, including the appropriate text, to be presented to a person for their acknowledgment or consent.
Multiparty Information Authorization Request	Tracks a request for multiple parties of authorization on a Data Use Purpose. For example, consent requests to share the required documents to open a joint financial account or share mortgage disclosures to loan applicants (borrower + co-borrower).

Configure Intelligent Document Automation

Configure the Intelligent Document Automation Settings for Authorization and Consent.

Add Data Use Purposes

Define the business and legal reasons why authorizations and consent are required.

Manage Authorization Form Text Versions

Manage different versions of consent and disclosure authorization form text based on locale and time period.

Generate Consent Authorization Requests

Manage consent and disclosure authorizations from customers alongside the accounts, financial accounts, and other records they pertain to. Generate multiple authorization form requests for a data use purpose.

Gather Consent and Disclosure Authorizations from Customers

Make sure that your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses. The process also supports consent on behalf of another person or group.

SEE ALSO:

Data Model Overview

Configure Intelligent Document Automation

Configure the Intelligent Document Automation Settings for Authorization and Consent.

Intelligent Document Automation provides a number of settings that control record sharing and how much information is captured when gathering consent responses.

To change these settings:

1. From Setup, enter `intelligent` in Quick Find. Under the Intelligent Document Automation heading, click **Intelligent Document Automation Settings**.

2. To enable a setting, set its toggle to **On**.

Add Data Use Purposes

Define the business and legal reasons why authorizations and consent are required.

Before creating authorization forms and generating authorization requests, define the purposes for collecting the information. Data use purposes can optionally link to data use legal basis records, which identify specific legal regulations.

To create a data use purpose record that links to a data use legal basis:

1. Create a Data Use Legal Basis record.

    a. From the Apps menu, enter `data` in the search field, then select **Data Use Legal Basis**.

    b. On the Data Use Legal Basis list page, click **New**.

    c. On the New Data Use Legal Basis page, enter a descriptive **Name**.

    d. (Optional) In the **Source** field, enter a value that helps identify the regulation.

    e. (Optional) Enter a description to provide more details.

    f. Save your work.

2. Create a Data Use Purpose record.

    a. From the Apps menu, enter `data` in the search field, then select **Data Use Purposes**.

    b. On the Data Use Purposes list page, click **New**.

    c. On the Data Use Purposes page, enter a descriptive **Name**.

    d. (Optional) Enter a description to provide more details.

    e. From the **Legal Basis** dropdown, select the Data Use Legal Basis record created in Step 1.

f. (Optional) If you're ready to create authorization forms for this data use purpose, click **Is Active**. An authorization form can only be created for an active data use purpose.

g. Skip the **Is Read Only** checkbox. It updates automatically when this record is activated.

h. Save your work.

Manage Authorization Form Text Versions

Manage different versions of consent and disclosure authorization form text based on locale and time period.

Intelligent Document Automation lets you present appropriate consent and disclosure information to customers based on their language and location.

First, create an Authorization Form record that specifies details like the form's effective dates, whether a user signature is required, and the associated regulation the form supports.

Each form specifies a default Authorization Form Text record, which stores or links to the text to be shown to the customer when asking for their consent. Add additional Authorization Form Text records for each locale and language you want to support.

An Authorization Form Text record can include the full text to be used, or it can link to a URL where the text is located. Only one Authorization Form Text record can be active for a locale at one time.

To create an authorization form and its authorization form text records:

1. Create an Authorization Form.

    a. From the Apps menu, enter `auth` in the search field, then select **Authorization Form**.

    b. On the Authorization Forms list page, click **New**.

    c. On the New Authorization Form page, enter a descriptive **Name**.

    d. (Optional) If this form might change in the future you can enter a **Revision Number** to help track revisions.

    e. (Optional) Specify the effective dates.

    f. Before this form can be used to fulfill authorization requests, an Authorization Form Text record must be specified in the **Default Auth Form Text** field. Skip this field for now if there are no text records available yet.

    g. (Optional) Indicate whether a person's signature is required when they give consent.

    h. (Optional) Indicate the name of the **Associated Regulation** or policy that pertains to this authorization form.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

i. (Optional) In the **Consent Duration Day Count** field, specify how many days a person's consent remains valid.

j. Save your work.

2. Create an Authorization Form Text record.

    a. From the Apps menu, enter `auth` in the search field, then select **Authorization Form Texts**.

    b. On the Authorization Form Texts list page, click **New**.

    c. On the New Authorization Form Text page, enter a descriptive **Name**. It's helpful to include the language and the time period in the name.

    d. From the **Authorization Form** dropdown, select the Authorization Form for this text.

    e. There are three options for specifying the text to be presented with the form. If the text is relatively short you can include it in its entirety in the **Summary Auth Form Text** field. If the text is available on a web page, you can provide a link to it in the **Full Authorization Form Url** field. If the text is available in an uploaded document file, such as a PDF file, you can specify the file using the **Content Document** dropdown.

    f. (Optional) Specify the effective dates.

    g. Before this form can be used to fulfill authorization requests, an Authorization Form Text record must be specified in the **Default Auth Form Text** field. Skip this field for now if there are no text records available yet.

    h. (Optional) If you're ready to use this text record with an authorization form, click **Is Active**. Only one authorization form text record per locale can be active at a time for a specific authorization form.

    i. Skip the **Is Read Only** checkbox and the **Last Activation Date Time** fields. They update automatically when this record is activated.

    j. Save your work.

3. Set the authorization form's default text to be the new authorization form text record.

    a. From the Apps menu, enter `auth` in the search field, then select **Authorization Form**.

    b. In the Authorization Forms list page, click the name of the form you created in Step 1.

    c. On the Authorization Form detail page, click **Edit**.

d. From the **Default Auth Form Text** field, select the authorization form text record you created in Step 2.

e. Save your work. This authorization form is now ready to use for generating authorization requests.

Generate Consent Authorization Requests

Manage consent and disclosure authorizations from customers alongside the accounts, financial accounts, and other records they pertain to. Generate multiple authorization form requests for a data use purpose.

Generate consent and disclosure forms for users to sign by creating an authorization request for a specific data use purpose. A single authorization request produces one or more authorization form requests for a customer, based on the data uses.

For example, during a mortgage loan initiation process a loan officer can create a Mortgage Disclosures authorization request. The Mortgage Initiation data use purpose listed two distinct uses, relating to two authorization forms. The request then generates multiple authorization request forms for the borrower to sign, including a Mortgage Servicing Disclosure form and a Good Faith Estimate Disclosure form.

To create an Info Authorization Request record:

1. From the Apps menu, enter `info` in the search field, then select **Info Authorization Request**.

2. Click **New**.

3. On the New Info Authorization Request page, enter a descriptive **Name**.

4. From the **Data Use Purpose** dropdown, select a data use purpose.

5. From the **Pertains To** dropdown, select the account that is the subject of the authorization.

6. From the **Consenter** dropdown, select the account provides the consent response.

7. (Optional) From the **Requester** dropdown, select the account, contact, or person who requested that authorization.

8. (Optional) From the **Locale** dropdown, select the most appropriate locale for the consenter.

9. (Optional) From the **Communication Type** dropdown, select the way to notify the consenter about the request.

10. (Optional) If the request is to be seen and authorized by more than one consenter, add a Multiparty Information Authorization Request.

    a. Click the search box that says **Search Multiparty Information Authorization Requests...**.

    b. Select an existing request or click **+ New Multiparty Information Authorization Request** to create one.

    c. Enter a descriptive name for the multiparty request.

    d. Click the **Data Use Purpose** field and select the same data use purpose that's specified in the related Info Authorization Request.

    e. Select an authorization type from the **Authorization Type** dropdown. The authorization type determines how many consenters must sign for the Info Authorization Request to be approved.

       The possible authorization type values are:

       - **All**: Every person approves the request.
       - **Any**: At least one person approves.
       - **Half or Majority**: Half or more of the people approve.
       - **Majority**: More than half the people must approve.

    f. Save your work.

11. For a new Information Authorization Request, leave the **Response Status** dropdown set to `New`.

12. In the Requested Date Time section, set the **Date** and **Time** fields to the time when the request was made.

13. In the Expiration Date Time section, set the **Date** and **Time** fields to the time when the request becomes invalid.

14. Save your work.

15. On the Info Authorization Request detail page, click the **Related** tab. The **Info Authorization Request Forms** related list displays one or more records generated for this request. A record is generated for each active authorization form that's related to the data use purpose specified in the Info Authorization Request.

Gather Consent and Disclosure Authorizations from Customers

Make sure that your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses. The process also supports consent on behalf of another person or group.

You can track whether a person has seen, signed, or rejected an info authorization request form, and how and when they gave their response. Optionally, capture additional information about the user response, including the user's email address, IP address, or geographic location at the time of consent, for verification and audit purposes.

To record a response to an info authorization request form:

1. On an Info Authorization Request detail page, click the **Related** tab.
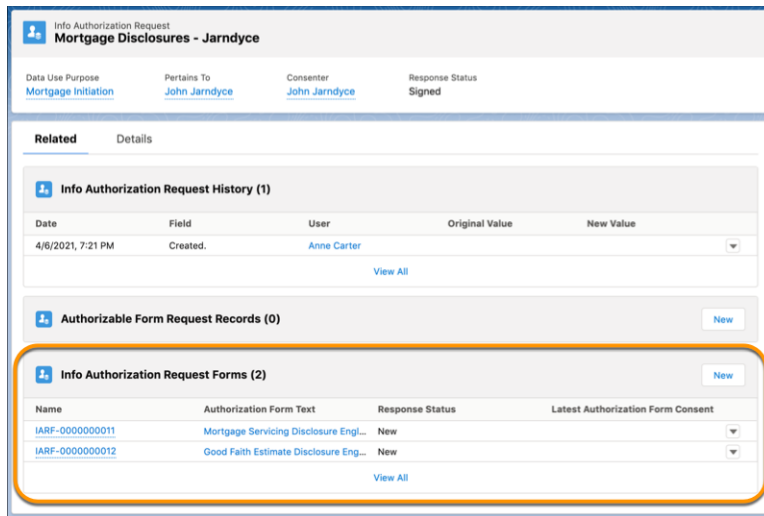
2. Select one of the forms in the **Info Authorization Request Forms** related list.

3. From the dropdown menu in the upper right, select **Edit**.
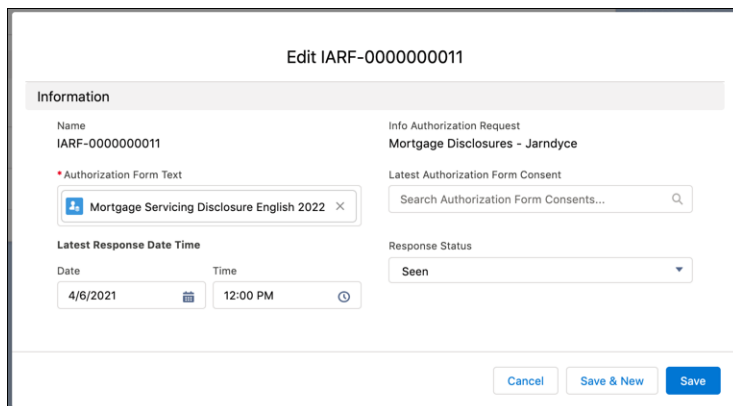
4. (Optional) To capture a simple response in this record:

   a. In the Latest Response Date Time section, set the **Date** and **Time** fields to the time when the response was given.

    b. From the **Response Status** dropdown, select the appropriate value, such as *Seen*, *Signed*, or *Rejected*.

5. (Optional) To capture a more detailed response, create an Authorization Form Consent record:

    a. From the **Latest Authorization Form Consent** dropdown, select *+ New Authorization Form Consent.*

    b. On the New Authorization Form Consent page, enter a descriptive **Name**.

    c. From the **Consent Giver** dropdown, select the account, contact, individual, or person who provided the response.

    d. From the **Authorization Form Text** dropdown, select the record representing the text that was shown to the person giving the response.

    e. (Optional) Add details about the source of the subject's response in the **Consent Captured Source** and **Consent Captured Source Type** fields.

    f. In the Consent Captured Date Time section, set the **Date** and **Time** fields to the time when the response was received.

    g. (Optional) In the Consent Expiration Date Time section, set the **Date** and **Time** fields to the time when the response stops being valid.

    h. From the **Status** dropdown, select the appropriate value, such as *Seen*, *Signed*, or *Rejected*.

    i. Save your work.

6. On the Edit Information Authorization Form, save your work to record the response.

Intelligent Need-Based Referrals and Scoring

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.

Install Intelligent Need-Based Referrals and Scoring

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

Enable the Referrer Score

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

Referral Approval Process

A referral approval process is an automated process that you can use to approve referrals in Financial Services Cloud. You can specify the steps necessary for a referral to be approved and who must approve it at each step.

Create a Process

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

Update the Leads Tab Name

Change the Leads tab name to `Leads & Referrals`. Changing the tab name changes Lead score to Lead & Referral score.

Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring

If there isn't an option to add referrals to rollups, enable referral rollups so users can see all the referrals for members of a group.

Configure Company Name Override for Leads

You can configure the company name override in Custom Settings as part of configuring the B2C lead conversion process.

Components That Track Intelligent Need-Based Referrals and Scoring

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

Install Intelligent Need-Based Referrals and Scoring

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

> 📝 **Note:** The package includes two dynamic dashboards. To install the package, your org must be under your Salesforce reports and dashboards limit. To extend your limit, contact Salesforce.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

1. Copy

   `http://industries.force.com/financialservicescloudextensionrb` into your browser and press Enter.

2. If you received a password from Salesforce, enter it.

3. Select **Install for Specific Profiles**.

4. Scroll to the Advisor profile, and set the Access Level to **Full Access**. This step maps the cloned profile that you created as a pre-installation task to the Advisor profile provided in the package.

5. Repeat for the Personal Banker, Relationship Manager, and any other relevant profiles.

6. Select **Install**.

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

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

SEE ALSO:

Report and Dashboard Limits, Limitations, Allocations, and Technical Requirements

Enable the Referrer Score

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

1. From Setup, enter `Custom Settings` in the Quick Find box, and then select **Custom Settings**.

2. Select **Manage** next to Wealth Application Config.

3. Click **New**.

4. Select **Enable Referrer Score**.

5. Save your changes.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Referral Approval Process

A referral approval process is an automated process that you can use to approve referrals in Financial Services Cloud. You can specify the steps necessary for a referral to be approved and who must approve it at each step.

Create a Lead Queue for Referral Approvers

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

Create an Approval Process

Use an Approval Process to automate the way referrals are approved.

SEE ALSO:

Set Up an Approval Process

Create a Lead Queue for Referral Approvers

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

1. From Setup, enter `Queues` in the Quick Find box, and then select **Queues**.
2. Click **New**.
3. For Label, enter `Referral Approvers`.
4. Accept the unique name.
5. Add the Lead object to Selected Objects.
6. Save your changes.

Create an Approval Process

Use an Approval Process to automate the way referrals are approved.

Before starting this step, create email templates for referral assignment notification and referral update notification emails. For details on how to create email templates, see the Email Templates in Lightning Experience help article.

1. From Setup, enter `Approval Processes` in the Quick Find box, and then select **Approval Processes**.
2. For Manage Approval Processes For, select **Lead**.
3. Select **Create New Approval Process | Use Jump Start Wizard**.
4. For Name, enter `Referral Approval Process`.
5. Accept the unique name.
6. For Approval Assignment Email Template, enter the name of the referral assignment notification email template you created.
7. For Select Approve, select **Automatically assign to queue**.
8. Select the Referral Approvers queue.
9. Save your changes.
10. Click **View Approval Process Detail Page**.
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:

   Salesforce Help: Email Templates in Lightning Experience

Create a Process

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

From Process Builder, create a process that meets your org's business requirements.

SEE ALSO:

   Process Builder

   Create a Process with Process Builder

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Update the Leads Tab Name

Change the Leads tab name to *Leads & Referrals*. Changing the tab name changes Lead score to Lead & Referral score.

> **Note:** Changing the Leads tab name affects all users, even if they're not using Intelligent Need-Based Referrals and Scoring.

SEE ALSO:

   Salesforce Help: Rename Object, Tab, and Field Labels

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Enable Referrals Rollups for Intelligent Need-Based Referrals and Scoring

If there isn't an option to add referrals to rollups, enable referral rollups so users can see all the referrals for members of a group.

Follow these steps to add the picklist value to enable referral rollups.

1. From Setup, click **Object Manager**, and then select **Account Contact Relationship**.
2. Select **Fields & Relationships**, and then click **Roll-Ups**.
3. In the Values section, click **New**.
4. Enter `Referrals` in the Roll-Ups field.
5. Save your changes.

Configure Company Name Override for Leads

You can configure the company name override in Custom Settings as part of configuring the B2C lead conversion process.

This override replaces the value of Company Name with the lead's full name when saving a B2C lead. If the override is disabled, a B2C lead cannot be saved until the lead's full name is entered in the Company Name field. By default, the override is enabled for System Administrator, Advisor, and Personal Banker profiles.

> 📝 **Note:** This setting is only applicable to orgs using the individual object model, it has no effect in orgs where the person account model is in use.

1. From Setup, enter `Custom Settings` in Quick Find, then select **Custom Settings**.
2. Select **B2C Lead Company Name Config** and click **Manage**.
3. Next to the profile to amend, click **Edit**.
4. To turn off the override, clear Override Company Name.

If you want to apply this custom setting to other profiles or users, add them and select Override Company Name.

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.

Enable the Expressed Interests Component

If you haven't made modifications to the unmanaged extension package, uninstall and reinstall it. No additional setup steps are required to enable the Expressed Interests component. If you have made modifications to unmanaged extension package, follow these setup steps.

Enable the Expressed Interests Component

If you haven't made modifications to the unmanaged extension package, uninstall and reinstall it. No additional setup steps are required to enable the Expressed Interests component. If you have made modifications to unmanaged extension package, follow these setup steps.

Add the Expressed Interests Component to Account Lightning Pages

Add the Expressed Interests Component to Account page layouts to make it available to users.

Create a Field Set for the Expressed Interests Component

Create the FSC Referrals Expressed Interest field set to use with the Expressed Interest Component.

Enable Edit Access to the Related Account Field on Lead

Financial Services Cloud permission sets provide access to the Related Account field. To give a user profile access to the Expressed Interests component, add edit access to the Related Account field on Lead.

Add the Expressed Interests Component to Account Lightning Pages

Add the Expressed Interests Component to Account page layouts to make it available to users.

1. Update an Account Lightning page.

   a. In Lightning App Builder, select a page layout, such as **Banking Individual Page - Two Column**.

   b. Select the **Referrals** tab.

   c. Drag the **Referrals Expressed Interest List - Financial Services Cloud** component onto the page layout. If you like, you can retitle it.

   d. Select the number of records you want to show.

   e. The default field set displayed is **FSC_Referrals_Expressed_Interest**.

   f. Save your changes.

2. Update the Referral Record layout.

   a. From Setup, open **Object Manager** and click **Lead**.

   b. Open **Page Layouts** and click **Lead (Referral) Layout**.

   c. Click **Edit**.

   d. In the Quick Find box in the **Page Layouts** modal, enter `Related Account.`

   e. Drag the **Related Account** field set to the **Referral Information** section.

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Create a Field Set for the Expressed Interests Component

Create the FSC Referrals Expressed Interest field set to use with the Expressed Interest Component.

1. From Setup, open **Object Manager** and click **Lead and Referral**.

2. Open **Field Sets** and click **New**.

3. Enter a **Field Set Label**:
   `LBLLabel_Field_Set_Referrals_Expressed_Interest.`

4. Enter a **Field Set Name**: `FSC_Referrals_Expressed_Interest.`

5. In **Where is this used?**, provide a description: `Client profile's Referrals tab.`

6. Save your changes.

7. Drag the following fields from the object palette to the **In the Field Set** container: **Name**, **Expressed Interest**, **Potential Value**, **Lead Status**, and **Last Modified Date**.

8. Click **Save** on the object palette.

Enable Edit Access to the Related Account Field on Lead

Financial Services Cloud permission sets provide access to the Related Account field. To give a user profile access to the Expressed Interests component, add edit access to the Related Account field on Lead.

1. Create a permission set that grants edit access to the Related Account field on the Lead object.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

   b. Click **New**.

   c. Enter a label, API name, and description for your permission set and click **Save**.

   d. In the Find Settings box, enter `Leads`, and select Leads under Object Settings.

   e. Click **Edit**.

   f. Under Field Permissions, enable edit access for Related Account and click **Save**.

2. Assign the permission set to users.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

   b. Click the permission set that you created that grants edit access to the Related Account field on the Lead object.

   c. Click **Manage Assignments**, and then click **Add Assignments**.

   d. Select the checkbox for each user you want to assign the permission set to, and then click **Assign**.

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

Interaction Summaries

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, your

users 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.
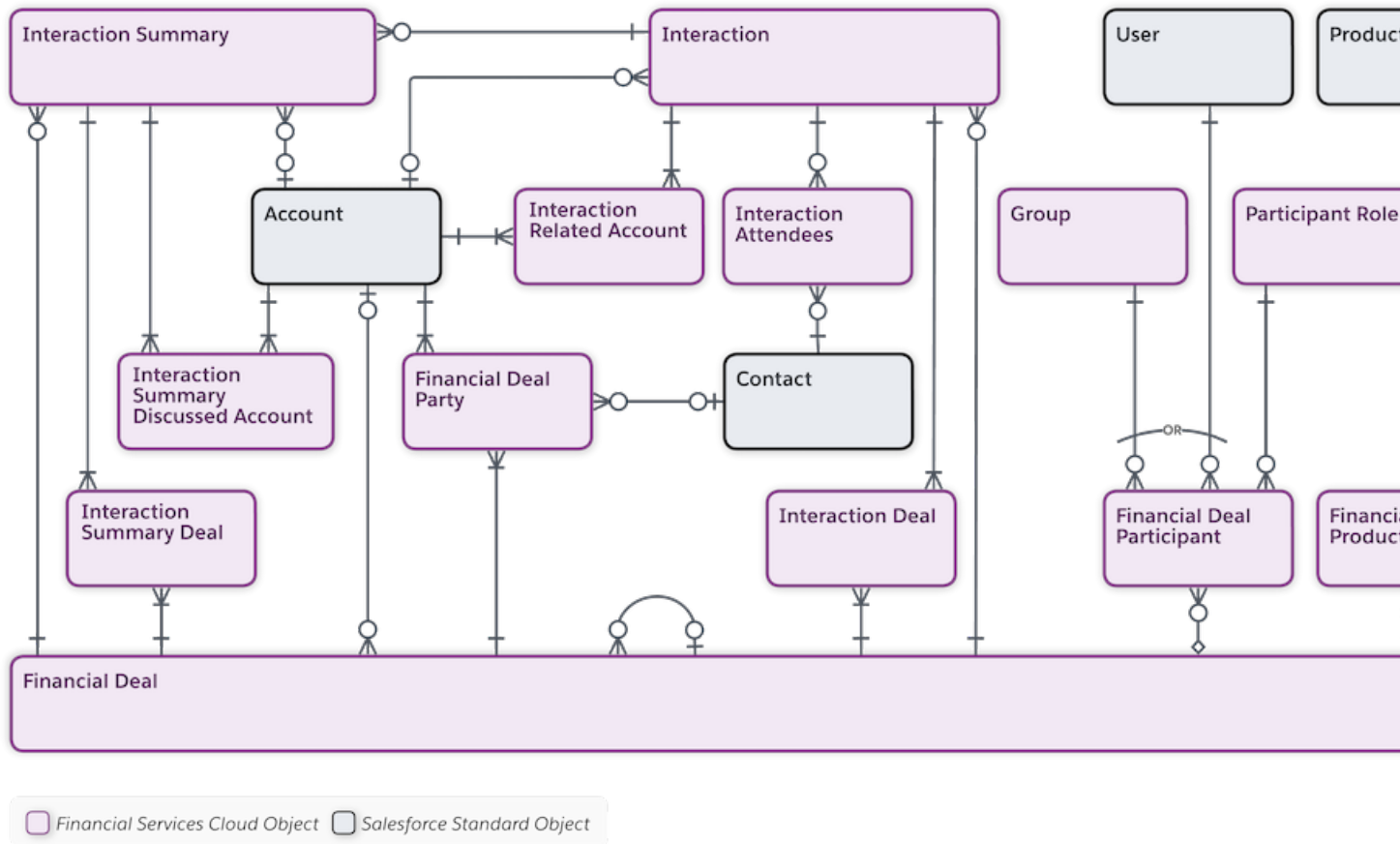
Enable and Configure Interaction Summaries

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.

Configure Sharing Settings for Interaction and Interaction Summaries

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

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

Keep interactions data in Salesforce up to date, and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

Enable and Configure Interaction Summaries

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

1. Enable the Interaction Summary setting.

    a. From Setup, in the Quick Find box, enter `Interaction Summary`, and then select **Interaction Summary Settings**.

    b. Enable **Interaction Summary**.

2. Add the Interaction Summaries component to the home page or any object record page.

    a. On the home page or the object record page, click the Setup icon, and select **Edit Page**.

    b. Drag the Interaction Summaries component to the page.

    c. Select a value from the **Lookup Field** dropdown menu.

    The component uses the Lookup Field value to populate the interaction summary records on the component.

    > 📝 Note: For Home page, the component ignores the lookup field value and shows all records that a user can access. Before you add the component and configure the Lookup Field, create a lookup from the Interaction Summary object to the required object. The values in the Lookup Field dropdown menu depend on the record page that you're editing.

    d. 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.

4. Add the Account Interactions component to the account record page.

    a. From Setup, in the Quick Find box, enter Interaction Summary, and then select Interaction Summary Settings.

    b. Enable **View Account Interaction as Admin**.

EDITIONS

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

USER PERMISSIONS

To enable and configure interaction summaries:
*   Financial Services Cloud Extension permission set

    AND

    Customize Application

This setting allows you to configure the Account Interactions component and determine whether to show data on the component for everyone with admin privileges.

c. On the account record page, click the Setup icon, and select **Edit Page**.

d. Drag the Account Interactions component to the page or to a tab on the page.

e. Select **View data as an admin**.

By default, users' access privileges control what data is shown on the component. You can override this default setting so that the component shows everyone the total number of interactions and all interacting users.

> **Note:** Before you can enable this setting, the View Account Interaction as Admin feature setting must be enabled for Interaction Summaries.

5. Configure related lists for the Interaction object to show all accounts related to an interaction on the Interaction Related Account related list.

a. From Setup, open **Object Manager**.

b. In the Quick Find box, enter `Interaction`, and then select **Interaction**.

c. Click **Page Layouts**, and then select **Interaction Layout**.

d. On the palette, select **Related Lists**.

e. Drag the **Interaction Related Account** from the object palette to the Related Lists container.

f. Under Related Lists, double-click the **Interaction Related Account** related list or click the wrench icon (🔧).

g. Under Columns, select the fields to include in the related list, and define the order in which the fields display. Select how to sort the records. The default is by record ID.

h. Click **OK**. Your changes aren't saved until you save the page layout.

i. Save the page layout.

SEE ALSO:

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Configure Sharing Settings for Interaction and Interaction Summaries

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

1. To prevent users from gaining automatic access to interactions or interaction summaries owned by or shared with their subordinates in a role hierarchy, disable the Role-Hierarchy-Based Sharing for Interaction Summaries setting.

   a. From Setup, in the Quick Find box, enter `Interaction Summary`, and then select **Interaction Summary Settings**.

   b. Disable **Role-Hierarchy-Based Sharing for Interaction Summaries**.

   c. Disable **Role-Hierarchy-Based Sharing for Interactions**.

   > 📝 Note: These settings are available only if the Interaction Summary setting is enabled.

2. Enable compliant data sharing for the Interaction and Interaction Summary objects.

   a. From Setup, in the Quick Find box, enter `Compliant Data Sharing`, and then select **Object Enablement Settings**.

   b. Enable **Interaction**.

   To share an interaction and to access the Interaction Participant object, ensure that compliant data sharing is enabled for the Interaction object.

   c. Enable **Interaction Summary**.

   To share an interaction summary and to access the Interaction Summary Participant object, ensure that compliant data sharing is enabled for the Interaction Summary object.

SEE ALSO:

Sharing Settings

Compliant Data Sharing for Financial Services

Work with Interaction Summaries

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

Create an Interaction

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

Prevent Duplicate Interaction Records

Use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

Add Attendees to an Interaction

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

View Account Interactions and Key Contacts

See at a glance the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Explore Accounts Associated With an Interaction

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account. For example, whether the account is Primary, Legal, or Audit.

Add Interest Tags to Interaction Summaries

Your users can add Interest Tags to Interaction Summaries. Instead of sifting through meeting notes to find relevant interactions, your users can filter interaction summaries by interest tags to quickly find the required interactions.

Share an Interaction

You can share a record from the Interaction Participants related list or by using the Manage Participants component.

Create an Interaction Summary

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

Share an Interaction Summary

You can share a record from the Interaction Summary Participants related list or use the Manage Participants component.

Search Interaction Summaries

Add the Interaction Summaries component to the account page so that bankers and financial advisors can search for interaction summaries. They can search for a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

Create an Interaction

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

1. From the App Launcher, select **Interactions**.

2. Change the list view to **All Interactions**.

3. Click **New**.

4. Enter a name for the interaction. For example, enter `Meeting with clients`.

5. Select the account of the client or partner who you interacted with.

6. Select the interaction start and date times, interaction type, and the location of interaction.

7. Save your changes.

Prevent Duplicate Interaction Records

Use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

SEE ALSO:

Salesforce Help Customize Duplicate Management

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.

SEE ALSO:

Enable and Configure Interaction Summaries

View Account Interactions and Key Contacts

See at a glance the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Ensure that the Account Interactions Lightning component is added to the account record page.

1. On the account record page, on the Account Interactions component, select a contact.

2. On the Interactions tab, view details about interactions with that contact, such as when the interactions occurred and how many attendees were involved.

3. To view details about the users interacting with that contact, click the **Interacting Users** tab.

Explore Accounts Associated With an Interaction

Use the new Interaction Related Account junction object to view all accounts for an interaction. Interaction Related Account is a junction between Interaction and Account objects. For each interaction, based on the interaction attendee details, the new junction automatically captures all accounts participating in that interaction. Then you can associate a role for each account. For example, whether the account is Primary, Legal, or Audit.

Your admin must add the Interaction Related Account related list to the Interaction record page layout. After the related list is configured,

If you've enabled Einstein Activity Capture for Financial Services Cloud in Salesforce, when you modify the interaction attendee details for an interaction, Salesforce automatically updates the Interaction Related Account related list. For example, if you remove an attendee from an interaction, the account details of that attendee is automatically removed from the Interaction Related Account related list.

1. From the App launcher, find and select **Interactions**.

2. From the Interactions list view, select the interaction for which you want to view all accounts related to that interaction.

3. Click the **Related** tab and on the **Interaction Related Account** related list you can view all accounts related to that interaction.

SEE ALSO:

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Enable Einstein Activity Capture for Financial Services Cloud (can be outdated or unavailable during release preview)

InteractionRelatedAccount (can be outdated or unavailable during release preview)

Add Interest Tags to Interaction Summaries

Your users can add Interest Tags to Interaction Summaries. Instead of sifting through meeting notes to find relevant interactions, your users can filter interaction summaries by interest tags to quickly find the required interactions.

Enable Topics for Objects

Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

Assign Interest Tags Permissions to Users

Give users access to use interest tags by assigning permission sets.

Enable Interest Tags

Enable the setting that turns on interest tags.

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

Add the Interest Tags Component to Interaction Summary Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

Assign Interest Tags to Interaction Summaries

On the interaction summary record pages where you added the Interest Tags component, your users can assign interest tags to capture client needs, interests, and prospect opportunities.

Assign Interest Tags by Using the Interaction Summaries Component

When you add the Interaction Summaries component to the account record page or home page, your users can assign interest tags to interaction summary records from the component itself. To quickly find the required interactions, users can also filter interaction summaries by interest tags.

Enable Topics for Objects

Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

📝 **Note:** The Access Interest Tags for Financial Services Cloud permission is enabled by default with the Financial Services Cloud Extension permission set.

1. Enable Topics for all the Financial Services Cloud objects that will show the Interest Tags component.

   a. From Setup, in the Quick Find box, enter `Topics`, and then select **Topics for Objects**.

   b. Select the object, and then select **Enable Topics**.

   c. Repeat this step for other objects.

2. Assign topics permissions to profiles.

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

   b. Click the profile you're editing.

   c. Click **Edit**.

   d. In General User Permissions, select the appropriate permissions.

      - Assign Topics: Let users add interest tags to records.
      - Create Topics: Let users create interest tags.
      - Delete Topics: Let users delete interest tags.
      - Edit Topics: Let users edit interest tags.

> 📝 **Note:** If you want to restrict who has access to create, edit, and delete interest tags and tag categories, give most of your users the Assign Topics permission only.

   e. Save your changes.

Assign Interest Tags Permissions to Users

Give users access to use interest tags by assigning permission sets.

1. Verify and update profile permissions for Interest Tags.

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

   b. Click the profile that you're editing.

   c. Click **Edit**.

     Use the same Topics object settings for Interest Tags, Tag Category Assignments, and Tag Categories objects.

   d. In Tab Settings, set tab visibility for Interest Tags, Tag Categories, and Tag Category Assignments.

   e. In Standard Object Permissions, set permissions for Interest Tags, Tag Categories, and Tag Category Assignments.

     If you want to restrict who can edit the names of Interest Tags and Tag Categories, grant most of your users View All and Read access.

   f. Save your changes.

   g. Repeat these steps for other profiles.

2. Create a permission set that gives access to Interest Tags.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

   b. Click **Clone** next to the Financial Services Cloud Extension permission set.

   c. Enter a label, such as `FSC with Interest Tags`.

   d. Clear the API name field and then press Tab to continue to the next field, so that the API name auto-populates.

   e. Optionally, edit the Description field.

   f. Click **Save**.

   g. In the Permission Sets list, click the name of the newly created permission set.

   h. Click the **System Permissions** link.

   i. Click **Edit**.

   j. Select the **Access Interest Tags for Financial Services Cloud** permission.

   k. Save your changes.

3. Assign the permission set to users.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

   b. Click the newly created permission set **FSC with Interest Tag**.

   c. Click **Manage Assignments**, and then click **Add Assignments**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Interest Tags:
- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

  d. Select each user that needs Interest Tags access, and then click **Assign**.

Enable Interest Tags

Enable the setting that turns on interest tags.

1. From Setup, in the Quick Find box, enter `Interest Tags`, and then select **Interest Tags**.

2. Turn on Interest Tags.

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

1. Select **Tag Categories** from the navigation bar.

2. In the Tag Categories list view, click **New**.

3. Enter a Category Name, such as `Sports`.

4. Enter a Description.

5. If you're creating a second-level or third-level tag category, select a Parent Category.

6. For Level, enter `1`, `2`, or `3`.

7. Select an Icon to visually represent the tag category.

8. To activate the new category, select **Is Active** and then click **Save**.

Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

🛑 **Important:** Make sure that you've created tag categories before you create interest tags. The Tag Category field is required when creating an interest tag record. If your org is using Topics, you can't have interest tag names identical to topic tag names. Check for existing topic tags by creating a report. We recommend either editing or removing topic tag names that you want to use as interest tags. Alternatively, avoid using Topics entirely if you're also using Interest Tags.

1. Select **Interest Tags** from the navigation bar.

2. In the Interest Tags list view, click **New**.

3. Enter a Tag Name and Description.

4. Select a Tag Category and click **Save**.
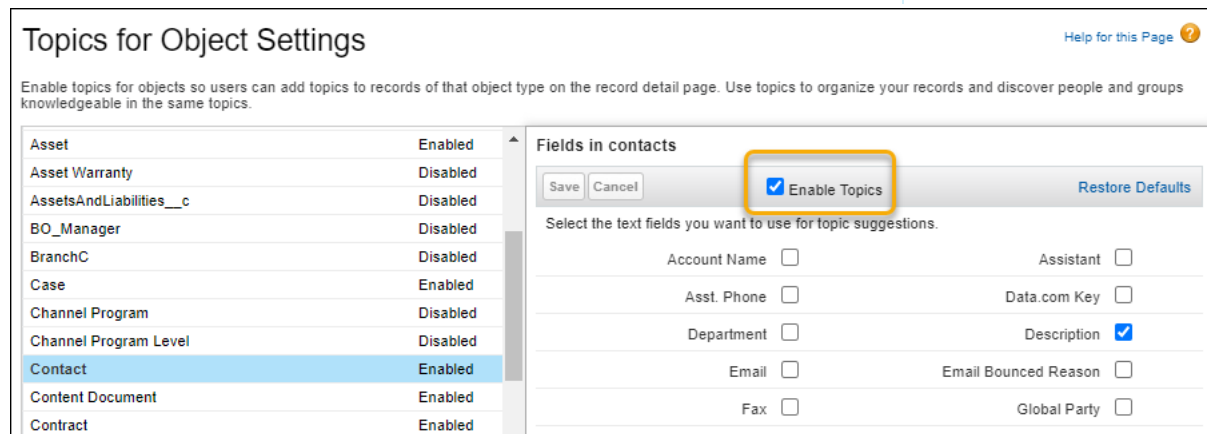
EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Interest Tags:
- Financial Services Cloud Extension permission set

  or

  Financial Services Cloud Foundations permission set

Add the Interest Tags Component to Interaction Summary Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

1. In Lightning App Builder, edit the Interaction Summary record page, drag **Interest Tags** from the Components panel to the Lightning page canvas, and then position it where you want it to appear.

2. In the properties panel:

   a. Enter a title.

   b. To let users search for interest tags, select **Show Search**.

   c. Enter the maximum number of tag categories that you want to show in the component. Users can expand the list to view more tag categories.

   d. Enter the maximum number of interest tags that you want to show in the component. Users can expand the list to view more tag categories.

     e. Save your changes.

3. If your page is new, activate the page.

Assign Interest Tags to Interaction Summaries

On the interaction summary record pages where you added the Interest Tags component, your users can assign interest tags to capture client needs, interests, and prospect opportunities.

1. On the Interest Tags component, click **All Tag Categories**, and then select a tag category by which you want to filter.

2. Enter an interest tag name, and then press Enter to search.

3. To add an interest tag, select the required tag.
All interest tags that are assigned to the record are organized by tag categories.

Assign Interest Tags by Using the Interaction Summaries Component

When you add the Interaction Summaries component to the account record page or home page, your users can assign interest tags to interaction summary records from the component itself. To quickly find the required interactions, users can also filter interaction summaries by interest tags.

1. On the Interaction Summaries component, click the interest tags icon (🏷) for the interaction summary record for which you want to assign interest tags.

2. Enter an interest tag name, and then press Enter to search.

3. Select an interest tag to add. All interest tags that are assigned to the record are organized by tag categories.

4. If the tag with the entered name doesn't exist, press Enter to create an interest tag with that name, and then assign it to the interaction summary record

    a. Enter a tag name and description.

    b. Select a tag category.

    c. Save your changes.

    This step assigns the new interest tag to the interaction summary record.

5. To filter interaction summaries by interest tags:

    a. At the upper-right corner of the component, click the filter by interest tag icon (🏷).

    b. Search for and select interest tags based on which you want to filter interaction summary records.

    c. Click **Apply**.

Share an Interaction

You can share a record from the Interaction Participants related list or by using the Manage Participants component.

Share an Interaction from the Interaction Participants Related List

You can share an interaction with a user or a group by adding them as participants to the record from the Interaction Participants related list. With this approach, you can share a record with only one user or a group at a time.

When you add the new Manage Participant component to an interaction record page, bankers and financial advisors can add multiple users or groups as participants to a record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Share an Interaction from the Interaction Participants Related List

You can share an interaction with a user or a group by adding them as participants to the record from the Interaction Participants related list. With this approach, you can share a record with only one user or a group at a time.

To share an interaction and to access the Interaction Participant object, ensure that compliant data sharing is enabled for the Interaction object.

1. From an interaction record page, on the Interaction Participants related list, click **New**.

2. From the Participant list, search for and select the user or the group that you want to share the interaction with.

3. Select a participant role, enter comments, and select **Active**.

4. Save your changes.

EDITIONS

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

USER PERMISSIONS

To share an interaction using the Interaction Participants related list:
- Financial Services Cloud Extension permission set

Share an Interaction Using the Manage Participants Component

When you add the new Manage Participant component to an interaction record page, bankers and financial advisors can add multiple users or groups as participants to a record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

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

1. Add the Manage Participants component to the interaction record page.

   a. On the interaction record page, click the Setup icon.

   b. Select **Edit Page**.

   c. Drag the Manage Participants component onto the page layout.

2. Configure the component, and then select participant types.

   a. Click anywhere on the Manage Participants component to select it.

   b. In the properties pane, under Participant Types for Suggestion List, click **Select**.

   c. Move the required participant types to the Selected list, and then click **OK**.

   d. Save your changes.

The Manage Participant component supports Account participants, Interaction Attendees, Financial Deal participants, and Opportunity participants as suggestions to share interaction records. Users or groups from these participant types appear as suggestions.

3. Add users or groups as participants.

   a. From an interaction record page, on the Manage Participants component, click **Add**.

   b. Search for and select users or groups, or select them from the Suggested Users or Groups section.

EDITIONS

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

USER PERMISSIONS

To share an interaction using the Manage Participants component:
- Financial Services Cloud Extension permission set

c. Click **Next**.

d. Select a participant role for every user or group, enter comments, and then select **Active**.

e. Click **Finish**.

f. Save your changes.

Create an Interaction Summary

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

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

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

2. Enter a title for the interaction summary and select the interaction that you're creating the summary for.

3. Specify the other details, such as interaction purpose, confidentiality, status, meeting notes, and next steps.

4. Select the related opportunity, partner account, and offering, if any.

5. Save your changes.

SEE ALSO:

Enable and Configure Interaction Summaries

Share an Interaction Summary

You can share a record from the Interaction Summary Participants related list or use the Manage Participants component.

Share an Interaction Summary from the Interaction Summary Participants Related List

You can share an interaction summary record with a user or a group by adding them as participants to the record from the Interaction Summary Participants related list. With this approach, you can share a record with only one user or a group at a time.

Share an Interaction Summary Using the Manage Participants Component

When you add the Manage Participant component to an interaction summary record page, bankers and financial advisors can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

Share an Interaction Summary from the Interaction Summary Participants Related List

You can share an interaction summary record with a user or a group by adding them as participants to the record from the Interaction Summary Participants related list. With this approach, you can share a record with only one user or a group at a time.

To share an Interaction Summary and to access the Interaction Summary Participant object, ensure that compliant data sharing is enabled for the Interaction Summary object.

1. From 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.

Share an Interaction Summary Using the Manage Participants Component

When you add the Manage Participant component to an interaction summary record page, bankers and financial advisors can add multiple users or groups as participants to the record. And they can assign roles from within the component. The component also provides a suggested list of users or groups to add to the record.

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

1. Add the Manage Participants component to the interaction summary record page.

   a. On the interaction summary record page, click the Setup icon.

   b. Select **Edit Page**.

   c. Drag the Manage Participants component onto the page layout.

2. Configure the component, and then select participant types.

   a. Click anywhere on the Manage Participants component to select it.

   b. In the properties pane, under Participant Types for Suggestion List, click **Select**.

   c. Move the required participant types to the Selected list, and then click **OK**.

   d. Save your changes.

The Manage Participant component supports Account participants, Partner Account participants, Interaction participants, Interaction Attendees, Financial Deal participants, and Opportunity participants as suggestions to share interaction summary records. Users or groups from these types appear as suggestions.

3. Add users or groups as participants.

   a. On an interaction summary record page, on the Manage Participants component, click **Add**.

   b. Search for and select users or groups, or select them from the Suggested Users or Groups section.

   c. Click **Next**.

   d. Select a participant role for every user or group, enter comments, and then select **Active**.

e. Click **Finish**.

f. Save your changes.

Search Interaction Summaries

Add the Interaction Summaries component to the account page so that bankers and financial advisors can search for interaction summaries. They can search for a record based on the interaction summary title, meeting notes, next steps, or any custom text fields. The search engine uses the Salesforce Object Search Language (SOSL) to retrieve the search results.

The Interaction Summaries component helps bankers and financial advisors to quickly find and review past interaction summaries. The component supports the use of the wildcard character asterisk (*) in a search query, such as *Joe Sm**. The component also supports infinite scroll to load interaction summaries.

The search engine looks for matches to the search term across a maximum of 2,000 records. If you're searching from more than 2,000 records, we recommend that you use the filters in the Interaction Summary component for more selective search results.

1. To access interaction summary records, click the **Show More** link at the bottom of the component.

2. Preview interaction attendees and open activities.

a. To preview interaction attendees for an interaction summary, click the interaction attendees icon (👤).

b. To preview open activities related to an interaction summary, click the open activities icon (☷).

> 📝 Note: The previews display only 30 records. To view all records, click **View All**.

3. On the Interaction Summaries component, click the sort icon (⇅).`

You can sort interaction summary records based on the creation date, the interaction start date and time, or the last modified date.

4. Select a sort option.

5. Choose how to populate interaction summaries.

You can also choose how to populate the interaction summary records—on the Interaction Summaries component—by selecting the lookup field that the component uses to populate records.

a. On the record page, click the Setup icon.

b. Select **Edit Page**.

c. Click anywhere on the Interaction Summaries component to select it.

d. In the properties pane, select a value from the Lookup Field dropdown menu.

The values in the dropdown menu depend on the record page that you're editing.

> 📝 Note: For the Home page layout, the component always shows a list of interaction summaries that a user can access. You can't override this behavior for the Home page.

6. Show or hide the New button to create interaction summaries.

By default, the component shows a New button that your users can click to create interaction summaries from the component itself. You can configure the component to hide the New button.

EDITIONS

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

USER PERMISSIONS

To search interaction summaries:
- Financial Services Cloud Extension permission set

    a. On the record page, click the Setup icon.

    b. Select **Edit Page**.

    c. Click anywhere on the Interaction Summaries component to select it.

    d. In the properties pane, select **Hide New button**.

Sync Interactions with Einstein Activity Capture

Keep interactions data in Salesforce up to date, and prioritize interactions that drive deal flow. By using Einstein Activity Capture for Financial Services Cloud, you can automatically sync events from connected email and calendar applications to Salesforce as interaction and interaction attendee records.

1. Set Up Einstein Activity Capture for Financial Services Cloud

   Review the steps for setting up Einstein Activity Capture for Financial Services Cloud.

2. Interactions and Einstein Activity Capture

   Learn what happens when interactions are enabled in an Einstein Activity Capture configuration.

SEE ALSO:

    Sales Productivity: Einstein Activity Capture (can be outdated or unavailable during release preview)

Set Up Einstein Activity Capture for Financial Services Cloud

Review the steps for setting up Einstein Activity Capture for Financial Services Cloud.

Before You Get Started

Make sure that Einstein Activity Capture is set up in Salesforce and that you understand how it works with events. Also, review how to set up and work with interaction summaries.

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

Admin Setup for Einstein Activity Capture

Give users access to Einstein Activity Capture. Connect your company's email and calendar applications to Salesforce, and create a configuration that controls how data moves between applications.

End-User Setup for Einstein Activity Capture

Connect your email and calendar accounts to Salesforce so that you can sync events from the connected accounts to Salesforce as interaction and interaction attendee records. Plus, prevent specific interactions from being synced to Salesforce.

Before You Get Started

Make sure that Einstein Activity Capture is set up in Salesforce and that you understand how it works with events. Also, review how to set up and work with interaction summaries.

Before you get started, we recommend these resources.

- Einstein Activity Capture Basics
- Einstein Activity Capture Considerations
- Set Up Einstein Activity Capture
- Events and Einstein and Activity Capture
- Enable and Configure Interaction Summaries
- Work with Interaction Summaries

Einstein Activity Capture supports syncing events and syncing events as interactions with the following differences:

Feature	Syncing Events	Syncing Interactions
Sync direction	Bi-directional	Unidirectional
Recurring Event Sync	Supported	Not supported
Activity Metrics	Supported	Not supported
Activity Timeline	Supported	Not supported
Activity Dashboard	Supported	Not supported
External Organizer Meeting Sync	Supported	Supported

Considerations for Working with Einstein Activity Capture for Financial Services Cloud

Keep in mind these considerations when using Einstein Activity Capture for Financial Services Cloud.

Setting Up Einstein Activity Capture for Financial Services Cloud

- If you're already syncing events using Einstein Activity Capture, then before enabling Einstein Activity Capture for Financial Services Cloud in your Salesforce org, you must either:
  - Reset your Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then set up a new Einstein Activity Capture configuration for syncing interactions.
  - Turn off the Event setting in each active Einstein Activity Capture configuration, enable Einstein Activity Capture for Financial Services Cloud, and then turn on the Interaction setting for the configurations.
- To enable Einstein Activity Capture for Financial Services Cloud, from the Einstein Activity Capture settings page, turn off **Activity Metrics** and **Activity Dashboard**.

Syncing Events as Interactions and Interaction Attendee

- Interactions are synced and records are created in Salesforce only when users have access to both Einstein Activity Capture and Financial Services Cloud licenses and permissions.
- Events organized by both internal Salesforce users and users external to Salesforce are synced as interactions.

- Interaction, Interaction Attendee, Interaction Participant, and Interaction Related Account records are created depending on the event organizer with the these similarities and differences:

Record/Owner	Event Organizer is an Internal Salesforce User	Event Organizer is a User External to Salesforce
Interaction record	An Interaction record is created during an Interaction sync.	An Interaction record is created during an Interaction sync.
Interaction owner	Salesforce user who set up the meeting	– The system promotes any one of the event attendees who is a Salesforce user and has an associated Einstein Activity Capture configuration as the owner of the Interaction record. – The newly assigned owner's connected calendar applications are used to sync the event details into Salesforce. What happens when the event attendee who was promoted as the Interaction owner is removed from the meeting invite? – An event sync is reinitiated – A new Interaction record is created, and the system promotes any of the other event attendees who is a Salesforce user and has an associated Einstein Activity Capture configuration as the owner of the Interaction record. – The newly assigned owner's connected calendar applications are used to sync the event details into Salesforce. – The old Interaction record is deleted.
Interaction Attendee records	Interaction Attendee records are created for all event attendees who are internal Salesforce users.	Interaction Attendee records are created for all event attendees who are internal Salesforce users.
Interaction Participant records	If Create Interaction Participants Automatically is enabled, Interaction Participant records are created asynchronously for all the event attendees who are internal Salesforce users except the owner user.	If Create Interaction Participants Automatically is enabled, Interaction Participant records are created asynchronously for all the event attendees who are internal Salesforce users except the owner user.
Interaction Related Account records	If Einstein Activity Capture for Financial Services Cloud is enabled, Interaction Related Account records are created	If Einstein Activity Capture for Financial Services Cloud is enabled, Interaction Related Account records are created

Record/Owner	Event Organizer is an Internal Salesforce User	Event Organizer is a User External to Salesforce
	asynchronously for all the invited Salesforce contacts.	asynchronously for all the invited Salesforce contacts.

- Interaction participant and interaction related account records are created asynchronously post the Interaction sync. Therefore, after the Interaction sync, there may be a time lag before the interaction participant and interaction related account records are created.
- If the interaction participant and interaction related account records can't be created, the interaction owner receives a notification. The interaction owner can click the notification to open the corresponding interaction record details page.
- Events synced with Einstein Activity Capture as interaction and interaction attendee records aren't supported on the activity timeline.
- You can create an Einstein Activity Capture configuration to sync events or interactions but not both.
- Syncing recurring events as interactions isn't supported. Event attachments don't sync between Microsoft Exchange or Google and Salesforce.
- The Activity Metrics and Activity dashboards aren't supported when syncing events as interactions in Salesforce.
- Syncing interactions is unidirectional. You can sync events only from connected email and calendar applications to Salesforce but not in the other direction.
- Because syncing is unidirectional, changes to synced records in Salesforce are overwritten the next time you sync those records with Einstein Activity Capture.

General Considerations

- Before activating a configuration with interactions enabled, we recommend preparing interactions that you don't want to sync to Salesforce. See Preparing to Sync Interactions on page 369.
- By default, interactions are synced starting from the date that the user's account is connected to Salesforce. To change this date, you can adjust the Filter by End Date when creating the configuration or later on the configuration's Advanced Settings tab. When editing the value on an existing configuration, the new value doesn't apply to users who already have an account connected.
- If interactions aren't syncing for a specific user, try removing the user from the configuration and then adding the user again. If you're using Microsoft Office 365 with an org-level or service account authentication method, you can test and reset the user.
- Synced interactions are available for Salesforce Reports.
- If there's no contact mapping for an attendee record, only the attendee's email is synced and displayed on the interaction record.
- To view the synced interaction attendee details, add the Interaction Attendee component to an Interaction record page layout.
- To view all accounts participating in the synced interactions on the related list, add the Interaction Related Account related list to an Interaction record page layout. When you remove an attendee from an interaction, the account details related to that attendee are also removed from the Interaction Related Account object.
- You can search synced interaction and interaction attendee records.
- The ownership of synced records is based on Compliant Data Sharing rules.

SEE ALSO:

Sales Productivity: Einstein Activity Capture Considerations (can be outdated or unavailable during release preview)

Sales Productivity: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Enable and Configure Interaction Summaries (can be outdated or unavailable during release preview)

Explore Accounts Associated With an Interaction (can be outdated or unavailable during release preview)

Admin Setup for Einstein Activity Capture

Give users access to Einstein Activity Capture. Connect your company's email and calendar applications to Salesforce, and create a configuration that controls how data moves between applications.

1. Enable Einstein Activity Capture for Financial Services Cloud

   Give users access to Einstein Activity Capture so that they can connect their email and calendar applications to Salesforce.

2. Create a Configuration to Sync Events as Interactions

   Einstein Activity Capture configurations define how data flows from the connected accounts to Salesforce. Review the default sync settings and change the settings, if necessary. After you have enabled Einstein Activity Capture for Financial Services Cloud, all references to events in the configuration UI, depending on the context, means interactions.

3. Create Interaction Participants

   Enable the Create Interaction Participants Automatically setting, and assign a default participant role to create interaction participants automatically after an interaction sync. Interaction participants are created for meeting attendees who are Salesforce users, excluding the attendee who is the meeting owner.

Enable Einstein Activity Capture for Financial Services Cloud

Give users access to Einstein Activity Capture so that they can connect their email and calendar applications to Salesforce.

Before you enable Einstein Activity Capture for Financial Services Cloud, ensure that you've enabled the Interaction Summary option in Salesforce. See Enable and Configure Interaction Summaries on page 345.

1. From Setup, in the Quick Find box, enter `Interaction Summary`.

2. Under Financial Services, select **Interaction Summary Settings**.

3. Enable **Einstein Activity Capture for Financial Services Cloud**.

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions where Financial Services Cloud and Einstein Activity Capture are enabled.

USER PERMISSIONS

To enable and configure interaction summaries:
- Financial Services Cloud Extension permission set

  AND

  Customize Application

Create a Configuration to Sync Events as Interactions

Einstein Activity Capture configurations define how data flows from the connected accounts to Salesforce. Review the default sync settings and change the settings, if necessary. After you have enabled Einstein Activity Capture for Financial Services Cloud, all references to events in the configuration UI, depending on the context, means interactions.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.

   If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you're moving from Lightning Sync or you already use Einstein Activity Capture but it's your first time creating a configuration, click **Add Contact and Interaction Sync** and follow the guided steps.

2. On the Configuration tab, click **New Configuration**.

3. Give the configuration a name and description.

4. Review the interaction settings, and then click **Next**.

5. Add users and profiles to the configuration, and then click **Next**.

SEE ALSO:

   Sales Productivity: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Create Interaction Participants

Enable the Create Interaction Participants Automatically setting, and assign a default participant role to create interaction participants automatically after an interaction sync. Interaction participants are created for meeting attendees who are Salesforce users, excluding the attendee who is the meeting owner.

Before you can view and enable the Create Interaction Participants Automatically setting:

- Ensure that you've enabled the Einstein Activity Capture for Financial Services Cloud.

- Ensure that Compliant Data Sharing is enabled for the Interaction object.

1. From Setup, in the Quick Find box, enter *Interaction Summary*.

2. Under Financial Services, select **Interaction Summary Settings**.

3. Enable **Create Interaction Participants Automatically**.

4. To assign a default participant role, select one of the default participant roles, and click **Assign**.

   - If you don't see any participant roles listed, click **Add Roles** to create a participant role with required access permissions for the Interaction object. Learn how to create a participant role for Complaint Data Sharing Enabled Objects.

   - When enabling or disabling the Create Interaction Participants Automatically setting, if you can't select a default participant role because it's disabled, delete the role from the Developer console, then refresh the Interaction Summary Settings page.

After you enable Create Interaction Participants Automatically, the interaction participant records are automatically created asynchronously after an interaction sync.

End-User Setup for Einstein Activity Capture

Connect your email and calendar accounts to Salesforce so that you can sync events from the connected accounts to Salesforce as interaction and interaction attendee records. Plus, prevent specific interactions from being synced to Salesforce.

1. Connect Your Email and Calendar Applications to Salesforce

   Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce.

2. Preparing to Sync Interactions with Einstein Activity Capture

   If your Salesforce admin configured Einstein Activity Capture to sync interactions to Salesforce, make sure that it works the way you want.

Connect Your Email and Calendar Applications to Salesforce

Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce.

SEE ALSO:

> *Sales Productivity*: Admin Setup for Einstein Activity Capture (can be outdated or unavailable during release preview)

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Preparing to Sync Interactions with Einstein Activity Capture

If your Salesforce admin configured Einstein Activity Capture to sync interactions to Salesforce, make sure that it works the way you want.

Prepare events that you don't want to sync as interactions before your admin turns on your Einstein Activity Capture configuration. You can manage which events sync at any time. To remove synced interactions from Salesforce, manually delete them.

To prevent personal events from syncing from your Google or Microsoft calendar to Salesforce as interaction and interaction attendee records, create a separate calendar. Einstein Activity Capture syncs only your default calendar to Salesforce.

When Salesforce admins define sync settings in Einstein Activity Capture configurations, they choose whether to sync users' private interactions. Users can also prevent interactions from syncing by assigning the private option to events from their calendar applications.

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions where Financial Services Cloud and Einstein Activity Capture are enabled.
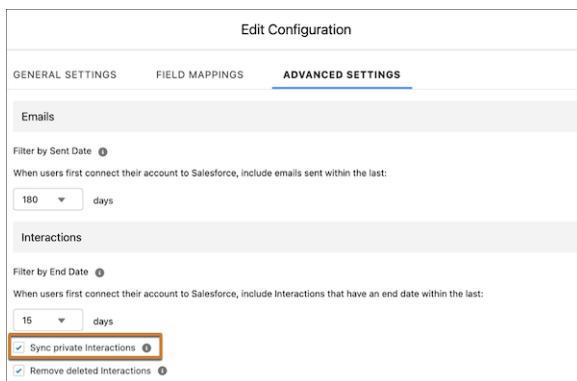
Interactions and Einstein Activity Capture

Learn what happens when interactions are enabled in an Einstein Activity Capture configuration.

How Interactions Sync with Einstein Activity Capture

Einstein Activity Capture matches your Microsoft or Google events with relevant Salesforce interactions and interactions attendees. Learn which interactions are synced and how often.

Field Mappings for Interactions Sync

When you use Einstein Activity Capture to sync interactions, fields from the connected Microsoft or Google account are mapped to fields in your Salesforce interactions.

How Interactions Sync with Einstein Activity Capture

Einstein Activity Capture matches your Microsoft or Google events with relevant Salesforce interactions and interactions attendees. Learn which interactions are synced and how often.

EDITIONS

Available in: Lightning Experience in **Professional**, **Enterprise**, and **Unlimited** Editions where Financial Services Cloud and Einstein Activity Capture are enabled.

Which Interactions Sync and How Are They Matched?

Einstein Activity Capture checks whether an interaction with the same subject, date, and start and end times exists in both Salesforce and Microsoft or Google. If interactions match, they're mapped to each other and synced to Salesforce. If no interactions match, a new interaction is created, and the two are mapped to sync unmatched interactions to Salesforce.

Because recent interactions are the most relevant to you, after your Salesforce admin initiates sync, Einstein Activity Capture attempts to match:

- New Salesforce interactions after you create them or existing Salesforce interactions after you update them
- New and existing Microsoft or Google interactions that fall within the filter and sync settings set by your admin

Interaction sync can take a day or more. Some factors can impact sync wait time, such as:

- If many users are set up to start syncing around the same time
- When sync is pending for a significant number of interactions

For example, at a large company, an extended wait time is likely on the first sync.

Einstein Activity Capture can sync up to 50,000 interactions per user at a time. If you have more than 50,000 events to sync, an additional nonsyncing interaction is picked up for sync only when one of the 50,000 stops syncing. An interaction stops syncing if you or someone with access deletes the interaction in Salesforce or your external calendar, if the interaction has occurred and no longer meets past event sync filters, or if an interaction sync issue occurs.

Deleting a Synced Interaction

If an admin selects **Remove deleted interactions from a configuration's advanced sync settings**, when you delete a syncing interaction, it's also removed from the connected accounts. You can delete an interaction in Salesforce only if the interaction hasn't already happened.

How Interaction Attendees Sync with Einstein Activity Capture

If you sync interactions with Einstein Activity Capture, invited contacts sync as Interaction Attendee records in Salesforce.

Interaction attendee details sync when the interaction organizer is a Salesforce user who's been set up to sync interactions with Einstein Activity Capture. If the interaction attendee isn't a Salesforce user or contact, only the email ID of the attendee is synced to Salesforce.

Einstein Activity Capture syncs up to 50 attendees per interaction.

Field Mappings for Interactions Sync

When you use Einstein Activity Capture to sync interactions, fields from the connected Microsoft or Google account are mapped to fields in your Salesforce interactions.

Object	Salesforce Field	Connected Account Field
Interaction	Name	Subject
	Account	No label
	Start Time	ActivityDateTime
	End Time	EndDateTime
	Interaction Type	No label
	Location	No label
	Related Record	No label
	Description	Description
Interaction Attendee	Attendee Type	No label
	Individual	No label
	User	Email ID
	Contact	To map the required or optional attendee to a Salesforce user or contact. If no mapping is available, only the email ID details are synced.
	Email ID	
	Attendee Response	Response
	Organizer	No label

Interest Tags

Let your users add custom Interest Tags to client records to capture client needs, interests, and prospecting opportunities. Having clients' interests in mind during client interactions helps deepen relationships. Organize interest tags into tag categories, which group similar interest tags so that you can easily create reports and dashboards showing common themes and interests across clients.

> **Note:** The Interest Tags object is a virtual object on the Topic object. Access to Interest Tags requires access to Topics for objects. Before setting up Interest Tags, turn on Topics for objects and configure user permissions for Topics. These permissions also control Interest Tag permissions. Then, select the Financial Services Cloud objects you want to show the Interest Tag component.

Enable Topics for Objects
Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

Assign Interest Tags Permissions to Users

Give users access to use interest tags by assigning permission sets.

Enable Interest Tags

Enable the setting that turns on interest tags.

Create an Interest Tags Dictionary

Before you create any interest tags or tag categories, work with your team to create a shared dictionary so that everyone has a well-organized, comprehensive set of interest tags to use. Brainstorm a list of interest tags, organize them into tag categories, and then create a hierarchy of up to three levels of tag categories.

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

Add the Interest Tags Component to Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

Assign Interest Tags to Records

On client record pages where you've added the Interest Tags component, such as Person Account, your users can assign interest tags to track a client's interests and attributes.

Browse for Interest Tags and Tag Categories

Search for interest tags and tag categories in the Browse for Interest Tags window. Select multiple tags and add them to your record at the same time.

Assign Interest Tags to Tag Categories

Organize interest tags using tag categories. You can assign each interest tag to up to three tag categories.

Build an Interest Tags Report

Build a report to show Interest Tags assigned to records, grouped by Tag Categories.

Considerations and Limitations for Interest Tags

When setting up and working with Interest Tags, be aware of these considerations and limitations.

SEE ALSO:

Set Up and Maintain Collaboration Tools: Topics for Objects

Enable Topics for Objects

Enable Topics for Financial Services Cloud objects. Topics is a prerequisite for setting up Interest Tags and assigning permissions.

> 📝 **Note:** The Access Interest Tags for Financial Services Cloud permission is enabled by default with the Financial Services Cloud Extension permission set.

1. Enable Topics for all the Financial Services Cloud objects that will show the Interest Tags component.

   a. From Setup, in the Quick Find box, enter `Topics`, and then select **Topics for Objects**.

   b. Select the object, and then select **Enable Topics**.

   c. Repeat this step for other objects.

2. Assign topics permissions to profiles.

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

   b. Click the profile you're editing.

   c. Click **Edit**.

   d. In General User Permissions, select the appropriate permissions.

   - Assign Topics: Let users add interest tags to records.
   - Create Topics: Let users create interest tags.
   - Delete Topics: Let users delete interest tags.
   - Edit Topics: Let users edit interest tags.

> 📝 **Note:** If you want to restrict who has access to create, edit, and delete interest tags and tag categories, give most of your
> users the Assign Topics permission only.

    e. Save your changes.

Assign Interest Tags Permissions to Users

Give users access to use interest tags by assigning permission sets.

1. Verify and update profile permissions for Interest Tags.

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

   b. Click the profile that you're editing.

   c. Click **Edit**.

   Use the same Topics object settings for Interest Tags, Tag Category Assignments, and Tag
   Categories objects.

   d. In Tab Settings, set tab visibility for Interest Tags, Tag Categories, and Tag Category
   Assignments.

   e. In Standard Object Permissions, set permissions for Interest Tags, Tag Categories, and Tag
   Category Assignments.

   If you want to restrict who can edit the names of Interest Tags and Tag Categories, grant
   most of your users View All and Read access.

   f. Save your changes.

   g. Repeat these steps for other profiles.

2. Create a permission set that gives access to Interest Tags.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select
   Permission Sets.

   b. Click **Clone** next to the Financial Services Cloud Extension permission set.

   c. Enter a label, such as `FSC with Interest Tags`.

   d. Clear the API name field and then press Tab to continue to the next field, so that the API name auto-populates.

   e. Optionally, edit the Description field.

   f. Click **Save**.

   g. In the Permission Sets list, click the name of the newly created permission set.

   h. Click the **System Permissions** link.

   i. Click **Edit**.

   j. Select the **Access Interest Tags for Financial Services Cloud** permission.

   k. Save your changes.

3. Assign the permission set to users.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

   b. Click the newly created permission set **FSC with Interest Tag**.

   c. Click **Manage Assignments**, and then click **Add Assignments**.

EDITIONS

Financial Services Cloud is
available in Lightning
Experience.

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

USER PERMISSIONS

To use Interest Tags:
- Financial Services Cloud
  Extension permission set

  or

  Financial Services Cloud
  Foundations permission
  set

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    d. Select each user that needs Interest Tags access, and then click **Assign**.

Enable Interest Tags

Enable the setting that turns on interest tags.

1. From Setup, in the Quick Find box, enter `Interest Tags`, and then select **Interest Tags**.

2. Turn on Interest Tags.

Create an Interest Tags Dictionary

Before you create any interest tags or tag categories, work with your team to create a shared dictionary so that everyone has a well-organized, comprehensive set of interest tags to use. Brainstorm a list of interest tags, organize them into tag categories, and then create a hierarchy of up to three levels of tag categories.

👁 **Example:** Here's a sample hierarchy showing two levels of hierarchy for tag categories and their corresponding interest tags.

    Tag category: Sport

- Tag category: Snow Sports
  - Interest tag: Skiing
  - Interest tag: Snowboarding

- Tag category: Water Sports
  - Interest tag: Sailing
  - Interest tag: Scuba Diving

Create Tag Categories

Create up to three levels of tag categories in a hierarchy to organize tag categories and interest tags.

1. Select **Tag Categories** from the navigation bar.

2. In the Tag Categories list view, click **New**.

3. Enter a Category Name, such as *Sports*.

4. Enter a Description.

5. If you're creating a second-level or third-level tag category, select a Parent Category.

6. For Level, enter *1*, *2*, or *3*.

7. Select an Icon to visually represent the tag category.

8. To activate the new category, select **Is Active** and then click **Save**.

New Tag Category

Information

* Category Name

Description

Parent Category

Search Tag Categories...

Level

* Icon ⓘ

Is Active

☐

Select an Item

System Information

Created By

Last Modified By

Cancel   Save & New   Save

SEE ALSO:

Lightning Design System: Icons

Create Interest Tags

Create interest tags and relate them to tag categories. Each interest tag can be assigned to up to three tag categories.

🛑 **Important:** Make sure that you've created tag categories before you create interest tags. The Tag Category field is required when creating an interest tag record. If your org is using Topics, you can't have interest tag names identical to topic tag names. Check for existing topic tags by creating a report. We recommend either editing or removing topic tag names that you want to use as interest tags. Alternatively, avoid using Topics entirely if you're also using Interest Tags.

1. Select **Interest Tags** from the navigation bar.

2. In the Interest Tags list view, click **New**.

3. Enter a Tag Name and Description.

4. Select a Tag Category and click **Save**.

Add the Interest Tags Component to Record Pages

Add the Interest Tags component to Lightning record pages so that your users can search for and assign interest tags to client records.

1. In Lightning App Builder, on the record page that you're editing, drag **Interest Tags** from the Components panel to the Lightning page canvas and position it where you want it to appear.

2. In the properties panel:

   a. Enter a title.

   b. To let users search for interest tags, select **Show Search**.

   c. Enter the maximum number of tag categories to display in the component.
   Users can expand the list to see more.

   d. Enter the maximum number of interest tags to display in the component.
   Users can expand the list to see more.

Page > Interest Tags

Summary details of Interest Tag component

Title ⓘ

Interest Tags

☑ Show search ⓘ

Enter the maximum number of categories to display ⓘ

3

Enter the maximum number of interest tags to display per interest tag category.

ⓘ

5

∨ Set Component Visibility

Filters

+ Add Filter

   e. Save your changes. If your page is new, activate it.

SEE ALSO:

Lightning App Builder: Create and Configure Lightning Experience Record Pages

Assign Interest Tags to Records

On client record pages where you've added the Interest Tags component, such as Person Account, your users can assign interest tags to track a client's interests and attributes.

1. In the Interest Tags component on a record page, click **All Tag Categories**, and then select a tag category to filter by.

2. Enter an interest tag name and press Enter to search.

3. Select an interest tag to add.
   All interest tags assigned to the record are organized by tag categories.
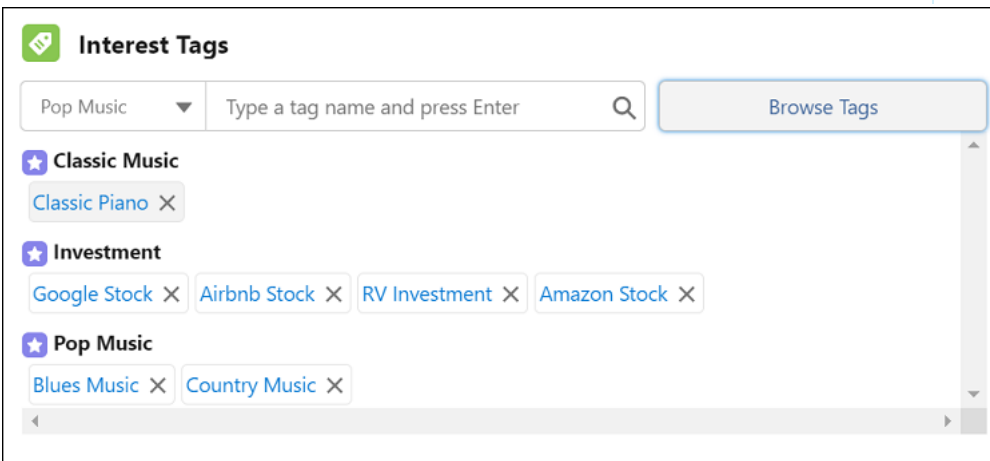
Browse for Interest Tags and Tag Categories

Search for interest tags and tag categories in the Browse for Interest Tags window. Select multiple tags and add them to your record at the same time.

1. In the Interest Tags component on a record page, click **Browse Tags**.

2. In the search bar, enter an interest tag or tag category name.

Browse for Interest Tags for Smith Household
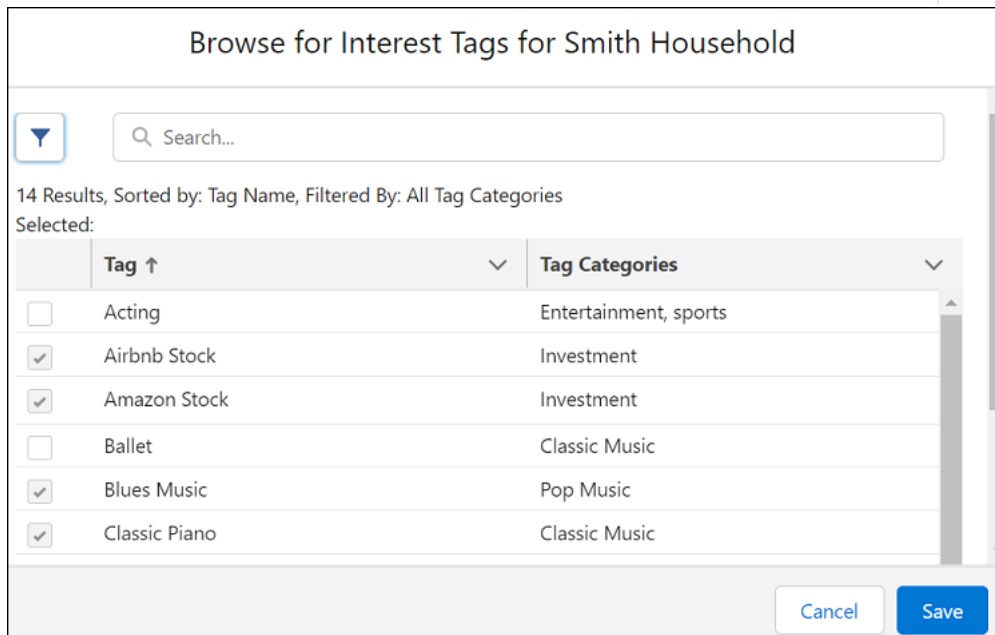
3. Expand the Tag Categories side panel to view your tag category hierarchies.
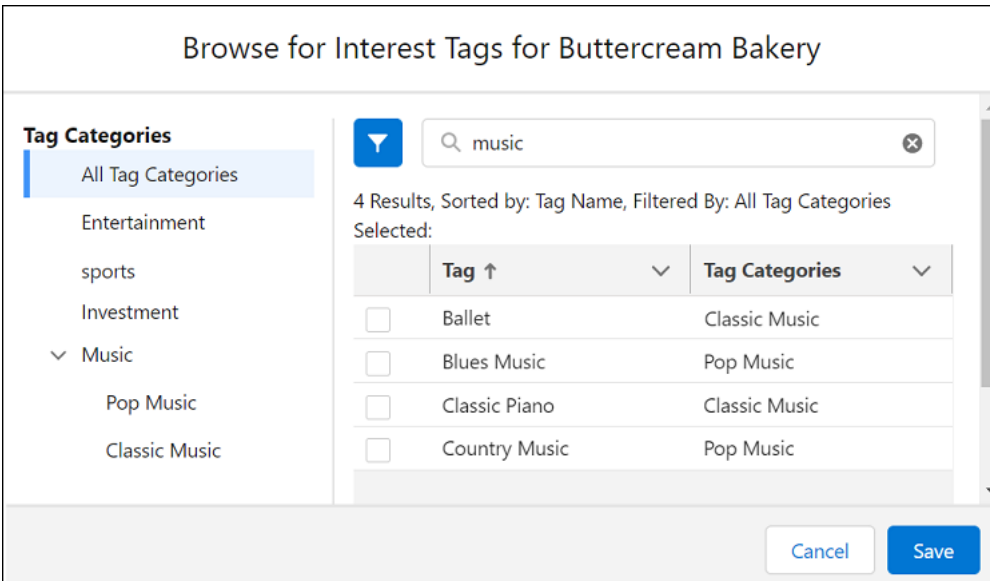
4. Select one or more interest tags and click **Save** to add them to the record.

Assign Interest Tags to Tag Categories

Organize interest tags using tag categories. You can assign each interest tag to up to three tag categories.

1. Select **Tag Categories** from the navigation bar.

2. Select a tag category name.

3. On the Related tab, in the Tag Category Assignments related list, click **New**.

4. Search for and select a Tag.

Only interest tags—not topic tags—can be assigned.

5. Verify the Tag Category and then click **Save**.
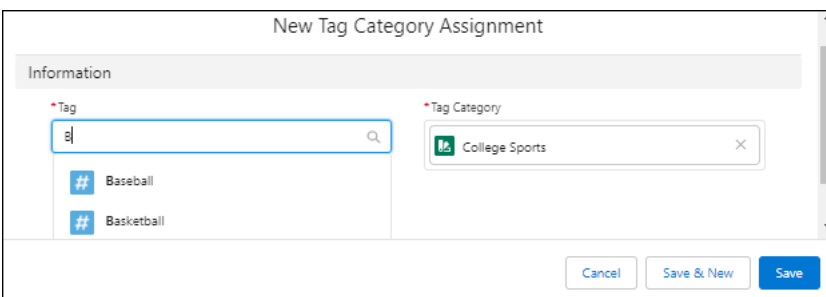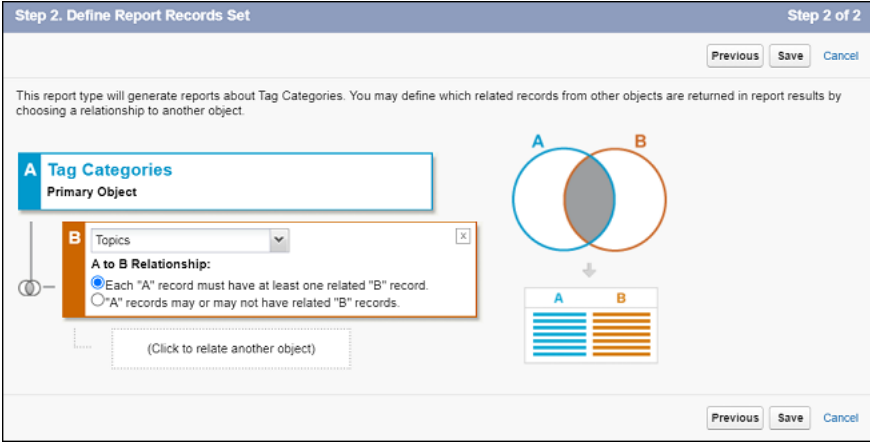
Build an Interest Tags Report

Build a report to show Interest Tags assigned to records, grouped by Tag Categories.

📝 **Note:** The Interest Tags object is a virtual object on the Topics object. To view Interest Tags, you must build a report using the Topics object.

1. Build a custom report type:

   a. From Setup, enter `Report Types` in the Quick Find box, then select **Report Types**.

   b. Click **New Custom Report Type** and select the Primary Object **Tag Categories**.

   c. Enter a Report Type Label, Report Type Name, and Description.

   d. Select a category to store the custom report type, select a Deployment Status, and click **Next**.

   e. Click **(Click to relate another object)** and click **Select Object**. Then select **Topics**. This step defines which related records from other objects are displayed in the report results.

   f. Save the custom report type.

2. Build a report that groups interest tags by tag category name.

   a. From the reports tab, click **New Report**.

   b. Choose your custom report type, then click **Continue**.

   c. Customize the report outline, click **Add Group…** and select **Category Name**.

   d. Click **Add column...** and select **Topic: Name**, **Description**, and **Topic Assignment: Name**.

   e. Customize the report filters, click **Filters**. Customize Show Me and Created Date filters.

   f. To show interest tags applied to specific objects, select **Add Filter…** and select **Record Key Prefix**.

   g. Enter the prefix of the object by which you want to filter.

To find the record key prefix for an object, open a record and copy the first 3 characters of the record ID in the URL.
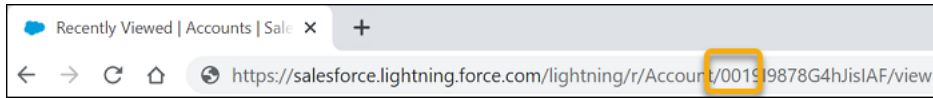
h. Save your report.

3. To view interest tag assignments, run the report.

a. From the Reports tab, select your report.

Topic: Name - Interest tag name.

Description - Interest tag description.

Topic Assignment: Name - The record the interest tag is assigned to.

SEE ALSO:

Set Up a Custom Report Type: Create a Custom Report Type

Set Up a Custom Report Type: Create Child Objects to Your Custom Report Type

Reports: Build a Report

Considerations and Limitations for Interest Tags

When setting up and working with Interest Tags, be aware of these considerations and limitations.

- If you use interest tags, we recommend not using topics to avoid confusion when assigning interest tags to records.
- You don't need to enable Chatter to enable Topics.
- You can't add custom actions to the Interest Tags page layout.
- You can't add additional fields to the Interest Tags object.
- We suggest keeping interest tags to three words or less for readability and usability.

- You can have more than one level 1 Tag Category.

- A single record can have up to 100 interest tags assigned.

- An interest tag can have up to 99 characters.

- Deleting an interest tag deletes the record and all tag assignments to records.

- The Interest Tags object doesn't appear in Object Manager because it's a virtual object built on the Topic object.

- Only record types of categories that the user has been granted access to appear in the interest tag record component.

- The custom report type for interest tags doesn't support polymorphic fields. In the report, you can include only the KeyPrefix and Name fields for the objects.

- You can create a maximum of 200 interest tags and tag assignments per Connect API call.

Know Your Customers

By using the Know Your Customer (KYC) data model, your users can perform identity verification, risk assessment, and screening checks of parties with ease. Parties can be accounts, contacts, or leads.

The KYC data model has several use cases. For example, your Onboarding team can use the model to validate a prospect's information that's submitted during an assessment. Or, your Operations team can use the model to verify the prospect's information and assign a risk rating.

Know Your Customer Data Model

☐ *Financial Services Cloud Object* ☐ *Salesforce Standard Object*

Use the Know Your Customer (KYC) data model to store information collected from a party during a KYC process. You can then use the data from Identity and Verification service providers or Screening service providers to verify the identity of the party or to perform various screening checks for the party.
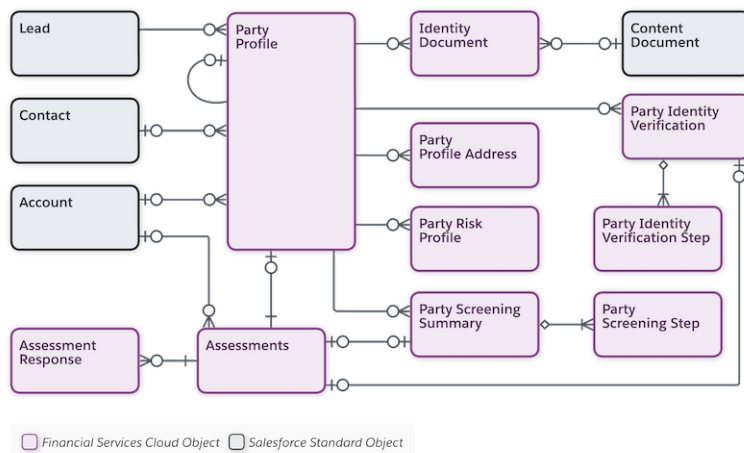
Enable Know Your Customer

Use the Know Your Customer (KYC) data model to store information collected from a party during a KYC process. You can then use the data from Identity and Verification service providers or Screening service providers to verify the identity of the party or to perform various screening checks for the party.

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

2. Enable **Know Your Customer**.

EDITIONS

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

USER PERMISSIONS

To enable Know Your Customer data model
- Financial Services Cloud Extension permission set

  AND

  Customize Application

OmniStudio for Financial Services Cloud

OmniStudio is a managed package of application components built on the Salesforce platform that you can download and install into Financial Services Cloud. Configure users to give your agents the ability to access the remote site and enable admins to customize appointment flows.

Why Omnistudio?

OmniStudio provides a suite of services, components, and data model objects that you can use to create applications and workflows using data from Financial Services Cloud and from external sources. When we update the OmniStudio package, the upgrades are pushed automatically to you. The OmniStudio package is required for Business Rules Engine and Decision Explainer.

EDITIONS

Available in Lightning Experience in **Enterprise** and **Unlimited** editions.

OmniStudio includes:

- OmniScripts, which define and contain user-interaction components and give you the flexibility to create logic for guided flows.
- DataRaptors, which transfer and transform data between Salesforce and the OmniScripts, FlexCards, and Integration Procedures tools.
- Integration Procedures, which bundle server-side data integration operations for efficiency and reuse.
- FlexCards, which display data and launch actions.

Install the Summer '21 or later release of the OmniStudio package. See OmniStudio Release Summary for Installation and Upgrade.

Follow the OmniStudio post-installation instructions. Set up FlexCards and configure designer, non-designer, and Experience site users of OmniStudio.

> **Note:** Experience site users are also called Digital Experience users or Community users.

Get Ready to Install OmniStudio for Financial Services Cloud
Prepare to add the OmniStudio managed package into your Financial Services Cloud org so that you can create guided interactions and other rich user experiences without code.

Install the OmniStudio Package for Financial Services Cloud

Install OmniStudio as a managed package into your Financial Services Cloud org.

SEE ALSO:

Salesforce Help: OmniStudio

Get Ready to Install OmniStudio for Financial Services Cloud

Prepare to add the OmniStudio managed package into your Financial Services Cloud org so that you can create guided interactions and other rich user experiences without code.

Get Started with DataPacks

To help you get up and running with OmniStudio, the Salesforce Industries Process Library offers sample processes and assets to help you quickly configure Financial Services Solutions workflows using OmniStudio components and features. After you install OmniStudio, download and install these DataPacks, as they're called, to quickly configure key workflows for your users.

📝 Note: Beginning with the 'Spring 22 release, the OmniStudio package replaces Vlocity INS. If you started using Financial Services Solutions before Spring '22, check with your account executive about licensing before you install OmniStudio.

Before you Install OmniStudio

- Make sure that your org doesn't already have OmniStudio installed. From Setup, search for and then select **Installed Packages**. If you have OmniStudio, don't install it again.
- Make sure you have the OmniStudio Admin, OmniStudio Runtime for Communities, and OmniStudio User permission set licenses.
- Complete the required steps to prepare your org for OmniStudio. See Prepare to Install the OmniStudio Package.
- Deploying the Lightning web components in the Financial Services Cloud DataPacks to your org requires that you use Visual Studio Code and Salesforce Developer Experience (DX). If you're unfamiliar with the Salesforce DX environment, complete the Quick Start: Lightning Web Components project and the Lightning Web Components Basics in Trailhead before you download and install the DataPacks.

Install the OmniStudio Package for Financial Services Cloud

Install OmniStudio as a managed package into your Financial Services Cloud org.

Every OmniStudio release has a unique download link. After the package installs, complete the required post-installation tasks.

1. Log out of all Salesforce orgs.

2. Go to the OmniStudio release summary documentation for a link to the current managed package installer.

3. Click the URL for the current OmniStudio package, or copy and paste it into your browser.

4. Log in to your Financial Services Cloud org.

5. Select **Install for All Users** and then click **Install**.

6. On the Approve Third-Party Access page, select the SSL Encrypted box for both websites, select **Yes, grant access to these third-party web sites**, and then click **Continue**.

7. When you receive an email indicating that the installation was successful, click **Done**.

8. Complete the post-installation tasks for the current release. For details, see OmniStudio release summary documentation.

Record Alerts

Alert your agents to changes in client records that require action. Using Record Alerts, agents can scan records for notifications that show information from your core banking system or from alerts that are stored in Salesforce.

Record alerts help agents decide what needs attention now or soon. For example, if an agent sees a low balance alert on the financial account that funds withdrawals, the agent can notify the client to transfer funds and avoid overdrafts. Agents can snooze alerts for later and dismiss them.

Create custom severity values for record alerts. Group similar record alerts by creating record alert categories. With Business APIs, aggregate and show alerts for financial account transactions, financial accounts, and person accounts in a hierarchical view.

If you are a Financial Services Cloud user, you can use the Financial Services Cloud permissions for Record Alerts.

Task	User Permissions
To use the Record Alerts data model and admin setup:	Financial Services Cloud Extension permission set OR Financial Services Cloud Foundations permission set
To user Data Consumption Framework for Record Alerts:	FSCAlertFramework AND FSCServiceExcellence
To configure a Record Alert expression set using Business Rules Engine:	Rule Engine Designer permission set AND Access Record Alerts for Business Rules Engine permission AND Financial Services Cloud Foundations OR Financial Service Cloud EUOZ OR Financial Services Cloud Extension

SEE ALSO:

Record Alerts

Record Association Builder

Define criteria for linking new or changed records with the branches that work with them.

Record linking happens behind the scenes when precondition formulas defined by association criteria are met. Association records provide a wealth of data about work attribution, productivity, or your custom performance indicators. Record Association Builder supports a number of standard objects including accounts, leads, opportunities, and more. It also supports custom objects, different owner ID fields, and custom Apex class logic to create association records.

The Record Association Builder relies on the Branch Unit, Banker, Branch Unit Business Member, and Branch Unit Related Record objects provided by the Branch Management feature.

📝 **Note:** Branch Association Settings has been retired. We recommend using Record Association Builder because it offers the same record linking capability plus the flexibility to use custom objects and customized association logic.

Assign Permissions to Users

Ensure that users can access and use Record Association Builder features by creating and assigning permission sets.

Grant Access to Record Association Builder Objects

To create and edit branch unit related records, Record Association Builder users need access to branch management objects.

Enable Record Association Builder

To define and activate criteria to automatically associate new and changed records with the user's currently assigned branch, enable the Record Association Builder setting.

Define Association Criteria

Define your own criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them.

Define Custom Apex Class Logic to Create Associations

Record Association Builder gives you the flexibility to fully customize how association records are created by using a custom association handler Apex class.

Record Association Execution Error Event

The record association builder automatically creates records when an active association criteria is met. If the record creation fails, a Record Association Execution Error Event record is created with details about the failure.

Considerations and Limitations for Record Association Builder

Here are some things to keep in mind as you implement Record Association Builder.

Assign Permissions to Users

Ensure that users can access and use Record Association Builder features by creating and assigning permission sets.

> **Note:** The **User license to access Record Association Builder in Financial Services Cloud** and **User license to access Branch Management in Financial Services Cloud** permissions are enabled by default if your organization has the Financial Services Cloud Extension permission set.

1. Create a permission set with the Record Association Builder and Branch Management permissions enabled.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

   b. Click **Clone** next to the Financial Services Cloud Extension permission set.

   c. Enter a label for your permission set, such as `FSC with Record Association Builder`.

   d. Clear the API name field and then tab to the next field, so the API name fills in automatically.

   e. (Optional) Change the Description field if desired.

   f. Click **Save**.

   g. In the Permission Sets list, click the name of the permission set you just created to edit it.

   h. Click the **System Permissions** link.

   i. Click **Edit**.

   j. Enable the **User license to access Record Association Builder in Financial Services Cloud** and **User license to access Branch Management in Financial Services Cloud** permissions.

   k. Click **Save**.

2. Assign the permission set to users.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.

   b. Click the name of the permission set that you created earlier, such as **FSC with Record Association Builder**.

c. Click **Manage Assignments**, and then click **Add Assignments**.

d. Select the checkbox for each user who will use Record Association Builder, and then click **Assign**.

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

SEE ALSO:

Salesforce Help: Licenses Overview

Financial Services Cloud Permission Set Licenses

Grant Access to Record Association Builder Objects

To create and edit branch unit related records, Record Association Builder users need access to branch management objects.

To use Record Association Builder, a user needs access to branch management objects, including Banker, Branch Unit, Branch Unit Business Member, and Branch Unit Related Record.

> **Note:** Branch Association Settings has been retired. We recommend using Record Association Builder because it offers the same record linking capability plus the flexibility to use custom objects and customized association logic.

To validate or grant a user's access levels for these objects:

1. From Setup, enter `Profiles` in Quick Find, then select **Profiles**.

2. Click the **Edit** link next to the profile you want to change.

3. Click **Object Settings**.

4. Click **Branch Units**. Validate that this profile has Read, Create, Edit, and Delete permissions to the Branch Unit object. If not, grant those permissions and click **Save**.

5. Repeat this step for **Bankers, Branch Unit Business Members,** and **Branch Unit Related Records**.

6. Repeat steps 2 through 5 for any other user profiles that you want to change.

SEE ALSO:

Salesforce Help: Edit Object Permissions in Profiles

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Enable Record Association Builder

To define and activate criteria to automatically associate new and changed records with the user's currently assigned branch, enable the Record Association Builder setting.

> **Note:** Only enable one of the Record Association Builder or Branch Management **Associate records to branches (Beta)** settings at the same time to avoid conflict. **Associate records to branches (Beta)** will eventually be retired. We recommend using the Record Association Builder since it offers the same record linking capability but provides greater flexibility to define your own association criteria.

To enable Record Association Builder:

1. From Setup, enter `association` in Quick Find. Under the Financial Services heading, click **Record Association Builder**.

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

2. To enable Record Association Builder, set the toggle to **On**.
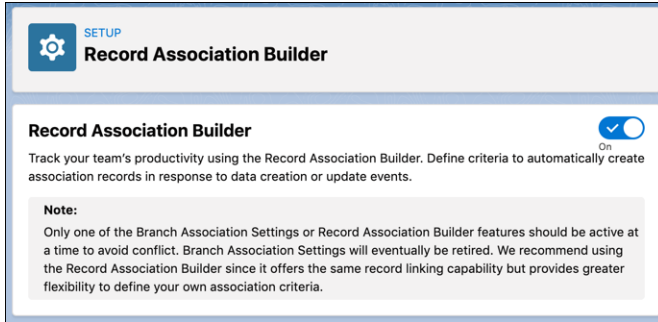
Define Association Criteria

Define your own criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them.

Record Association Builder extends the automatic record linking capabilities that come with the Branch Management feature. Branch Management lets you automatically attribute new accounts and leads to specific branches. Record Association Builder lets you define your own criteria for associating new or updated records with the branches that work with them.

To define or edit association criteria, use the Record Association Builder settings page in Setup. You can edit an existing association criteria that is in Draft status, inactivate one that is Active, or delete one that hasn't generated any associations.
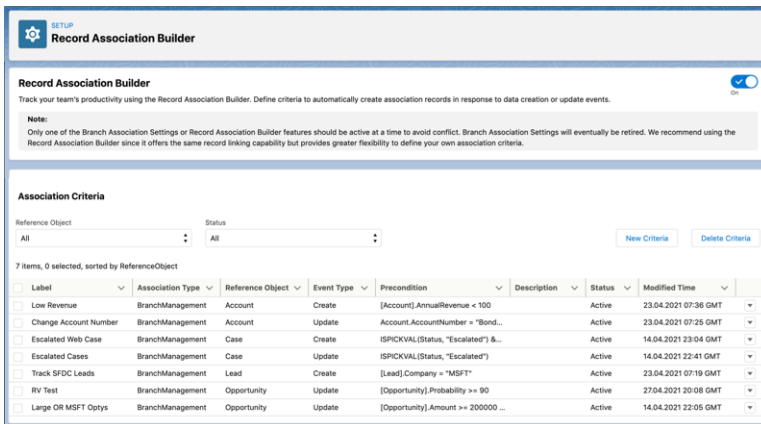
The Reference Object and Event Type fields determine which object events, such as the creation of a record, cause the criteria to be evaluated. Record Association Builder directly supports the following reference objects:

- Account (including Person Account)
- Lead
- Opportunity
- Case
- Contact
- Interaction Summary

Record Association Builder supports the following Financial Services Cloud objects:

- Assets and Liabilities
- Financial Accounts

Record Association Builder supports all custom objects.

Record Association Builder listens for Create and Update event types for each object. A Create event occurs whenever a new record is created for that object. An Update event occurs whenever one or more fields in an existing record are changed.

One reference object can have up to five association criteria.

The Precondition section includes a formula that, when true, causes a new association to be created. Precondition formulas use the same format as the formulas for calculated fields.

Table 17: Examples of Precondition Formulas

Reference Object	Event Type	Precondition Formula	Description
Lead	Create	ISPICKVAL([Lead].Status, "Qualified")	A qualified lead is created.
Opportunity	Update	ISPICKVAL([Opportunity].Stage, "Closed")	An existing opportunity is closed.
Account	Create	[Account].AnnualRevenue > 3000000 && [Account].NumberOfEmployees > 20	An account is created that meets requirements for annual revenue and number of employees.
Person Account	Update	[Account].FSC12__NetWorth__c > 500000	Net Worth Greater than 500k
Contact	Update	[Contact].MailingCity = 'San Francisco'	Contact whose mailing city is San Francisco.
Interaction Summary	Create	[InteractionSummary].Name = 'Follow-up Interaction'	Interaction Summary whose name/title is Follow-up Interaction.

To create an association criteria record for one of the directly supported reference objects, follow the steps in the order listed.

1. From Setup, in the Quick Find box, enter `association`, and then select **Record Association Builder**.
2. Click **New Criteria**.
3. On the New Criteria page, enter a descriptive Name. The API Name field value is filled in automatically.
4. Select the association type in the **Association Type** dropdown.
5. (Optional) Add a description if desired. A description can be helpful for differentiating criteria that are based on similar events or formulas.
6. Select an object in the **Reference Object** dropdown.
7. Select an event type in the **Event Type** dropdown.
8. Specify a formula in the **Precondition** formula field. You can use the controls in the **Insert** bar above the formula to insert elements at the cursor location in the formula field.

9. Keep the **Use an alternate owner ID** checkbox unchecked to use the default Owner ID field when making associations. If the Reference Object you selected doesn't include an Owner ID field, or if you want to use a different ID field:

   a. Click **Use an alternate owner ID**.

   b. Click the search box.

   c. In the **Select a Field** window use the filter control to find and select the ID field to use.

   d. Click **Choose** to select that field.
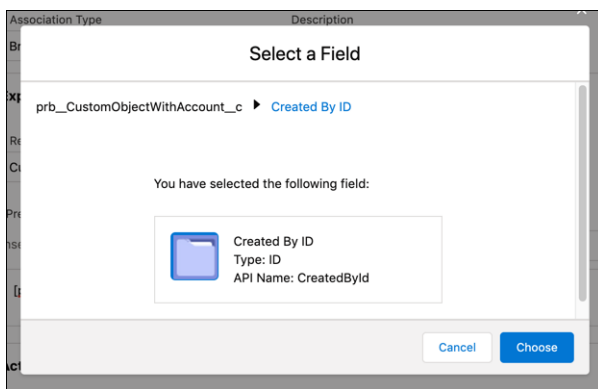
10. Keep the **Activation** set to *Draft* if you want to edit this criteria in the future. Only select *Active* in the **Activation** dropdown when you're ready to enable automatic associations whenever this criteria is met.

11. Save your work.

Define Custom Apex Class Logic to Create Associations

Record Association Builder gives you the flexibility to fully customize how association records are created by using a custom association handler Apex class.

By default, Record Association Builder uses the Owner ID field on a standard or custom object when creating association records. You can specify a different ID field by selecting **Use an alternate owner ID** for the association criteria. The alternate owner ID field must link to a user or contact object that's enabled for use as a Banker. If your custom object or alternate owner ID field doesn't meet that requirement, you can program custom logic to create association records a different way.

Record Association Builder lets you specify a custom Apex class to handle the creation of association records for a specific association criteria. The custom Apex class must:

- apply to an object that isn't directly supported the Record Association Builder;
- implement the `fscwmgen.BranchManagementAssociationHandler` interface;
- return a list of Branch Unit Related Records;
- populate at least the minimum required fields in each Branch Unit Related Record:
  - BranchUnitId: Represents the current branch unit of the user or contact
  - BusinessUnitMemberId: The Banker ID of the user or contact
  - RelatedRecordId: The ID of the custom object to be related

To specify a custom association handler Apex class for an association criteria:

1. On the New Criteria or Edit Criteria page, make sure that the **Use an alternate owner ID** checkbox is checked.

2. Specify the alternate ID field to use:

   a. Click the search box that says **Select a field on the reference object...**.

   b. In the **Select a Field** window use the filter control to find and select the ID field to use.

   c. Click **Choose** to select that field.

3. Click the **Use Apex class** checkbox.

4. Click the search box that says **Search Apex Classes...**. Specify an Apex class that implements the `fscwmgen.BranchManagementAssociationHandler` interface.

5. Save your work.

Record Association Execution Error Event

The record association builder automatically creates records when an active association criteria is met. If the record creation fails, a Record Association Execution Error Event record is created with details about the failure.

The error event provides the following information:

- Error Type: Specifies the types of error that occurred.
- Error Detail: The information about the error and its solution.
- Association Type: The type of association criteria that was triggered from the error event.
- Associated Record: The Additional information about the branch unit related record and the event.

Build a Flow to Subscribe to Record Association Execution Error Events
Build a flow to send an email when a Record Association Execution Error Event is published.

Build a Flow to Subscribe to Record Association Execution Error Events

Build a flow to send an email when a Record Association Execution Error Event is published.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Click **New Flow**.
3. Select **Platform Event - Triggered Flow**, then click **Create**.
   a. Click **+ Choose Platform Event**.
   b. Click **Search platform events...** and select **Record Association Execution Error Event** and click **Done**.
4. Click **+** and select **Action**.
   a. Select **Email**. Then click **Search email actions...** and select **Send Email** (this will take a few minutes to load).

b. Enter a label and description.

c. Below Body, in the Enter value or search resources box, enter `RecordAssocExecErrorEvent` and select the arrow next to RecordAssocExecErrorEvent. Then select **ErrorDetail**.
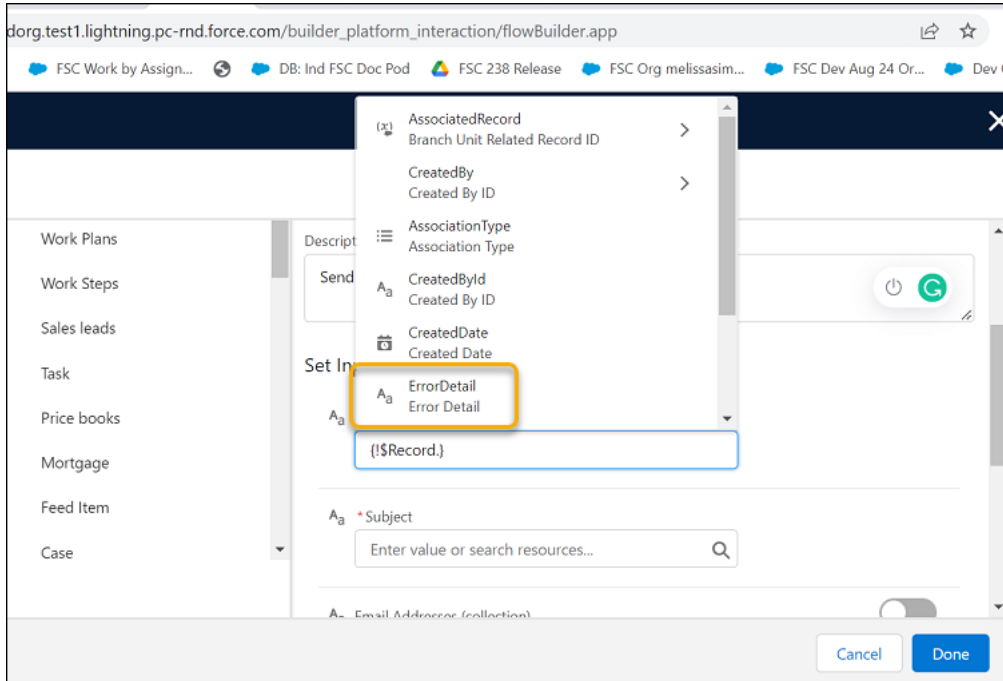
d. Enter a Subject.

e. Select a delivery method.

f. Click **Done**.
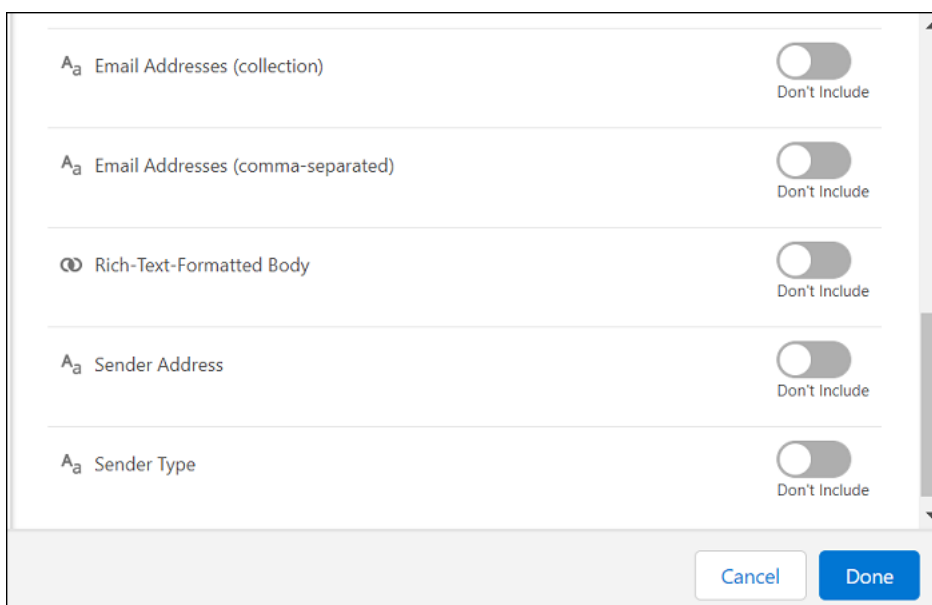
5. Save and activate the flow.

Considerations and Limitations for Record Association Builder

Here are some things to keep in mind as you implement Record Association Builder.

- One reference object can have up to five active association criteria.
- An association criteria's precondition formula can handle up to three spanning relationships (also known as cross-object references).
- When an object event occurs and more than one active criteria is met, only the first criteria that's met generates a branch unit related record. Multiple associations aren't created.
- Record association builder stores association data in branch unit related records, but doesn't create Branch Unit Customer records based on account creation events.
- The Branch Unit Related Record object doesn't currently appear in list views or have a Lightning page layout.
- Custom fields can't be added to the Branch Unit Related Record object.
- Association records created by record association builder impact your data storage. Consider this impact when defining criteria that create associations based on common or verbose events, such as record updates.
- Generating a branch unit related record can take a minute or more after an object event occurs and an association criteria precondition is met.
- Custom formula fields from contacts can't be used within person account formulas. Don't include embedded formula fields for other objects in formula fields for person accounts.

Rollups

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

Record Rollups

Record rollups aggregate information from related records for a number of objects in Financial Services Cloud at a client- or group-level. Client-level records are aggregated by default; no setup is required. Enable group-level rollups to aggregate related records for all primary group members.

Rollup By Lookup Rules

Rollup By Lookup (RBL) rules aggregate your data at a high level. When you edit a financial account record or primary group membership, the RBL configuration updates the corresponding RBL client- and group-level summaries.

Record Rollups, Rollups By Lookup, and Data Loads

Control record rollups and rollups by lookup to maximize data load performance.

Record Rollups

Record rollups aggregate information from related records for a number of objects in Financial Services Cloud at a client- or group-level. Client-level records are aggregated by default; no setup is required. Enable group-level rollups to aggregate related records for all primary group members.

When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Household__c lookup field. As a result, these records are displayed at the group level on the corresponding components or related lists.

⊘ **Important:** Don't change the Household__c field. Any change to this field can cause inconsistent group-level rollups.

Group-level rollups are supported for all primary members.

Object	Where to View	Type
Financial Account	Financial Account List, Financial Account Role, Bank Account, Investment Account, Insurance Policy	Component
Financial Goals	Financial Goal	Component
Assets and Liabilities	Assets and Liabilities	Component
Referrals	Referrals Expressed Interest List, Referrals Made List	Component
Events	Activities	Related List
Tasks	Activities	Related List
Opportunities	Household Opportunities	Related List
Case	Household Cases	Related List
Claim	Household Claims	Related List
Claim Participant	Household Claim Participants	Related List
Insurance Policy	Household Insurance Policies	Related List
Insurance Policy Participant	Household Insurance Policy Participants	Related List

Enable Group Record Rollups

When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Household__c lookup field. As a result, the rolled up records are displayed at the group level on the corresponding components or related lists.

Extra Steps to Enable Rollups for Opportunities, Policies, Claims, and Referrals

Not all objects are set up for group-level rollups by default. If you don't see related lists for insurance-related objects, cases, opportunities, or referrals, add picklist values to the Rollup__c field on the Account Contact Relationship object.

Define Rollup Settings for Objects

For faster record rollups at the household level when performing rollups in batches, use the Record Rollup Configuration custom setting to configure various rollup settings for each object individually. For example, you can define a batch size to limit the number of records in each batch. When you run the batch job to roll up records, these settings help improve the performance of the batch job.

Optimize Record Rollup Performance

Use Optimize Record Rollups to optimize record rollup performance.

Optimize Record Rollup Triggers in Financial Services Cloud

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

Record rollups populate the household on the records that are associated with members of a household. You can perform record rollups in real time (through triggers) or in batches using batch jobs.

SEE ALSO:

Enable Group Record Rollups

When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Household__c lookup field. As a result, the rolled up records are displayed at the group level on the corresponding components or related lists.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

2. Click **Manage** next to Wealth Application Config.

3. Click **Edit**.

4. Select **Enable Group Record Rollups**.

5. Save your changes.

Extra Steps to Enable Rollups for Opportunities, Policies, Claims, and Referrals

Not all objects are set up for group-level rollups by default. If you don't see related lists for insurance-related objects, cases, opportunities, or referrals, add picklist values to the Rollup__c field on the Account Contact Relationship object.

In new orgs with Insurance for Financial Services Cloud, the Rollup__c field on the Account Contact Relationship object includes the insurance-related picklist values. However, if you're configuring Insurance for Financial Services Cloud in an existing org, perform these steps to add the picklist values.

To show all Primary Group member cases on a related list at the group level, add Cases as a picklist value to the Rollup__c field on Account Contact Relationship.

To show all Primary Group member opportunities on a related list at the group level, add Opportunities as a picklist value to the Rollup__c field on Account Contact Relationship.

To show all Primary Group member referrals on a related list at the group level, add Referrals as a picklist value to the Rollup__c field on Account Contact Relationship.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Account Contact Relationship`, and then select **Account Contact Relationship**.

3. Click **Fields & Relationships**, and then select **Roll-Ups**.

4. Under Values, click **New**.

5. In the Roll-Ups field, enter these picklist values. Enter each value on its own line.

   - Cases
   - Claims
   - Claim Participants
   - Insurance Policies

- Insurance Policy Participants
- Opportunities
- Referrals

6. Save your changes.

Define Rollup Settings for Objects

For faster record rollups at the household level when performing rollups in batches, use the Record Rollup Configuration custom setting to configure various rollup settings for each object individually. For example, you can define a batch size to limit the number of records in each batch. When you run the batch job to roll up records, these settings help improve the performance of the batch job.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

2. Click **Manage** next to Record Rollup Configuration.

3. Click **New** to add an object and define rollup settings for the object.

4. If you have triggers that don't depend on the Household field, the **Skip Triggers** can improve rollup performance.

   🛑 **Important:** Rollup by Lookup, depends on the Household field. If you use Rollup by Lookup, don't select Skip Triggers.

5. To update records without updating the Last Modified By and Last Modified Date fields, select **Update Records Silently**.

6. Save your changes.

Repeat the steps to add the objects that you want to define these settings.

SEE ALSO:

    Optimize Record Rollup Performance

    Record Rollup Batch Jobs

Optimize Record Rollup Performance

Use Optimize Record Rollups to optimize record rollup performance.

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

2. Enable Record Rollup Optimization.

SEE ALSO:

    Record Rollup Batch Jobs

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Optimize Record Rollup Triggers in Financial Services Cloud

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

1. From Setup, in the Quick Find box, enter `Metadata`, and then select **Custom Metadata Types**.

2. On the Custom Metadata Types Setup page, click **Manage Records** next to Use Standard Trigger.

3. On the Standard Triggers page, click the name of the trigger to update.

4. Click **Edit**, and select **Active**.

5. Click **Save**.

> **EDITIONS**
>
> Financial Services Cloud is available in Lightning Experience.
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Record Rollup Batch Jobs

Record rollups populate the household on the records that are associated with members of a household. You can perform record rollups in real time (through triggers) or in batches using batch jobs.

To enable record rollup processing through triggers, enable the Enable Group Record Rollups setting. To perform record rollups in batches, use the GroupAssignmentBatchable batch job.

> 🛑 **Important:** If you have enabled the Record Rollup Optimization setting, use the HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

Only one of the two batch jobs, GroupAssignmentBatchable or HouseholdAssignmentBatchable, can be used in an org. GroupAssignmentBatchable is enabled by default in orgs. To use the HouseholdAssignmentBatchable job, enable the Record Rollup Optimization setting.

The GroupAssignmentBatchable Job

Run the GroupAssignmentBatchable job to perform group record rollups in batches. If you defined rollup settings for objects (using the Record Rollup Configuration custom setting), you can use the RecordRollupConfig method to run the GroupAssignmentBatchable job. The RecordRollupConfig method lets you perform group record rollups for one or more objects at a time.

If you enabled the Record Rollup Optimization setting, use the HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

SEE ALSO:

The GroupAssignmentBatchable Job

Run the GroupAssignmentBatchable job to perform group record rollups in batches. If you defined rollup settings for objects (using the Record Rollup Configuration custom setting), you can use the RecordRollupConfig method to run the GroupAssignmentBatchable job. The RecordRollupConfig method lets you perform group record rollups for one or more objects at a time.

> **EDITIONS**
>
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>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions

For All Objects, With Rollup Settings

To run the job for all objects with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
Database.executeBatch(new FinServ.GroupAssignmentBatchable());
```

For One or More Objects, Overriding the Rollup Settings

To run the job for one or more objects, overriding the custom rollup settings, you must construct new instances of the FinServ.GroupAssignmentBatchable.RecordRollupConfig class and pass them to FinServ.GroupAssignmentBatchable.runRecordRollupJob(List<FinServ.GroupAssignmentBatchable.RecordRollupConfig> recordRollupConfigs).

FinServ.GroupAssignmentBatchable.RecordRollupConfig provides two constructors.

```
//startTime, endTime, and scope can be set to null.
//When set to null value, the values are read from the custom setting.

//Constructor 1:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime)

//Constructor 2:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime, Integer scope)
```

Sample code:

```
FinServ.GroupAssignmentBatchable.RecordRollupConfig recordRollupConfigFinancialAccount =
new FinServ.GroupAssignmentBatchable.RecordRollupConfig('FinancialAccount__c',
DateTime.newInstance(2009, 3, 4, 21, 2, 2), null, 500);
FinServ.GroupAssignmentBatchable.RecordRollupConfig recordRollupConfigCase = new
FinServ.GroupAssignmentBatchable.RecordRollupConfig('Case', null, null, null);

List<FinServ.GroupAssignmentBatchable.RecordRollupConfig> recordRollupConfigs = new
List<FinServ.GroupAssignmentBatchable.RecordRollupConfig>{recordRollupConfigFinancialAccount,
 recordRollupConfigCase};
```

```
FinServ.GroupAssignmentBatchable.runRecordRollupJob(recordRollupConfigs);
```

The HouseholdAssignmentBatchable Job

If you enabled the Record Rollup Optimization setting, use the HouseholdAssignmentBatchable batch job instead of the GroupAssignmentBatchable job to roll up records in batches.

For a Single Object, With Rollup Settings

To run the job for a single object with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
FinServ.HouseholdAssignmentBatchable.runJob('Task');
```

For Multiple Objects, With Rollup Settings

To run the job for multiple objects sequentially with rollup settings defined in the Record Rollup Configuration custom setting, use this code.

```
FinServ.HouseholdAssignmentBatchable.runJob(new List<String> {'FinancialAccount__c',
'Task'});
```

For One or More Objects, Overriding the Rollup Settings

To run the job for one or more objects, overriding the custom rollup settings, you must construct new instances of the FinServ.HouseholdAssignmentBatchable.RecordRollupConfig class and pass them to FinServ.HouseholdAssignmentBatchable.runJob(List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig> recordRollupConfigs).

FinServ.HouseholdAssignmentBatchable.RecordRollupConfig provides two constructors.

```
//startTime, endTime can be set to null.
//When set to null, the filter is not applied when querying the object.

//Constructor 1:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime)

//Constructor 2:
RecordRollupConfig(String objectName, Datetime startTime, Datetime endTime, Integer scope)
```

Sample code:

```
FinServ.HouseholdAssignmentBatchable.RecordRollupConfig recordRollupConfigFinancialAccount
 = new FinServ.HouseholdAssignmentBatchable.RecordRollupConfig('FinancialAccount__c',
DateTime.newInstance(2009, 3, 4, 21, 2, 2), null, 500);
FinServ.HouseholdAssignmentBatchable.RecordRollupConfig recordRollupConfigCase = new
FinServ.HouseholdAssignmentBatchable.RecordRollupConfig('Case', null, null);

List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig> recordRollupConfigs = new
List<FinServ.HouseholdAssignmentBatchable.RecordRollupConfig>{recordRollupConfigFinancialAccount,
```

```
 recordRollupConfigCase};

FinServ.HouseholdAssignmentBatchable.runJob(recordRollupConfigs);
```

To run the jobs concurrently for multiple objects, you can call FinServ.HouseholdAssignmentBatchable.runJob() multiple times. Here's an example.

```
FinServ.HouseholdAssignmentBatchable.runJob('Task');
FinServ.HouseholdAssignmentBatchable.runJob('Claim');
```

Rollup By Lookup Rules

Rollup By Lookup (RBL) rules aggregate your data at a high level. When you edit a financial account record or primary group membership, the RBL configuration updates the corresponding RBL client- and group-level summaries.

RBL rules are available only for Assets and Liabilities, Claims, Financial Accounts, Financial Account Roles, Insurance Policies, and Revenues objects.

⚠ **Warning:** We don't recommend or provide support for creating or customizing Financial Services Cloud RBL rules.

Rollup By Lookup Configuration and Criteria Fields

Use Rollup By Lookup Configuration and Rollup By Lookup Criteria fields to control when RBL rules are triggered.

Packaged Rollup By Lookup Configurations

Financial Services Cloud supports these packaged RBL configurations.

Enable Rollup By Lookup Rules

Enable RBL rules for client- and group-level rollups.

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

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

Rollup By Lookup Configuration and Criteria Fields

Use Rollup By Lookup Configuration and Rollup By Lookup Criteria fields to control when RBL rules are triggered.

Changes in records don't always trigger active RBLs rules. Three general conditions are evaluated.

1. Are the **Enable Group Record Rollups** and **Enable Rollup Summary** Wealth Management Config custom settings selected for the user who made the change?

2. Is the record type ID for the affected record included in the RBL?

3. If there's a Where Clause, does it evaluate to true?

When all three conditions are true, either the appropriate RBL rules are triggered to run or an Apex job that will trigger the appropriate rules is queued.

RBL rules are made up of two Financial Services Cloud objects: Rollup By Lookup Configuration and Rollup By Lookup Filter Criteria. Rollup By Lookup Configurations define rules for calculating rollup fields. Rollup By Lookup Filter Criteria define criteria for calculating rollups.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions
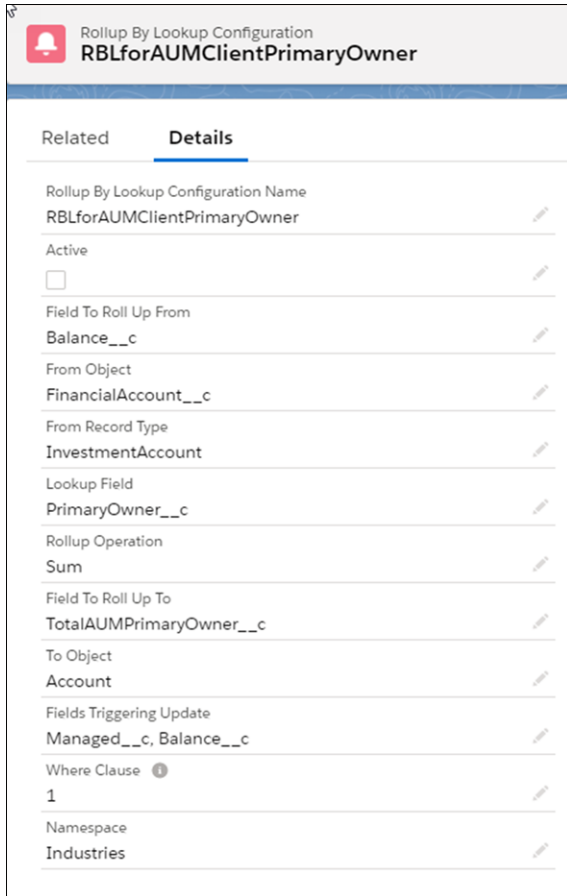
Table 18: Rollup By Lookup Configuration Fields

Name	Description	Example
Active	Indicates whether the rule is active.	When the rule is active and all conditions are true, the rule is triggered to run or will queue an Apex job.
Field to Rollup From	The field to aggregate.	RBLforAUMClientPrimaryOwner can be triggered when a change is made to either the Managed__c or the Balance__c fields on a financial account, RBLforAUMClientPrimaryOwner rolls up the Balance__c on all related financial accounts with a record type of InvestmentAccount. It does this for the primary owner, and writes the result to the TotalAUMPrimaryOwner__c field of the primary owner's account record
From Object	The source object that provides the Lookup Field and, for all objects except Financial Account Role, the Field to Rollup From. For Financial Account Role objects, the Field to Rollup From is on the financial account records related to the financial account role record.	
From Record Type	The specific source object record types to aggregate (if specified).	
Lookup Field	The type of rollup to do. Rollup types include: • Group-level household lookup on Assets and Liabilities, Claims, Financial Accounts, and Insurance	

Note (in Example column, continued): **Note:** RBLforAUMClientPrimaryOwner, RBLforAUMHH, and RBLForFARforAUMClientPrimaryOwner all roll up to the TotalAUMPrimaryOwner__c field on the Account object so activate only one of the three rules.

Name	Description	Example
	Policies objects. Lookup Field is set to Household___c. • Client-level lookup on Financial Account and Assets and Liabilities objects. Lookup Field is set to PrimaryOwner___c for the primary owner lookup and JointOwner___c for the joint owner lookup. • Client-level lookup on Financial Account Role objects. Lookup Field is set to PrimaryOwner___c for the primary owner lookup and JointOwner___c for the joint owner lookups.	
Rollup Operation	Specifies the type of operation for the aggregation. Valid operations are:. • Sum • Max • Min • Avg • Count	
Field to Roll Up To	The target object field to update with the aggregated information.	
To Object	The target object for the aggregated information. All packaged RBLs update a field on the Account object.	
Fields Triggering Update	The fields on the source object that can trigger an update. When left blank, any edit on the source object can invoke a rollup recalculation.	
Where Clause	The filter criteria clause. The clause can also be a logic statement with two or more filter criteria. When left blank, any changes to the source object or the specified triggering fields can invoke a rollup recalculation.	RBLforAUMClientPrimaryOwner has one filter criteria that's defined in the A-05 rollup by lookup filter criteria record.
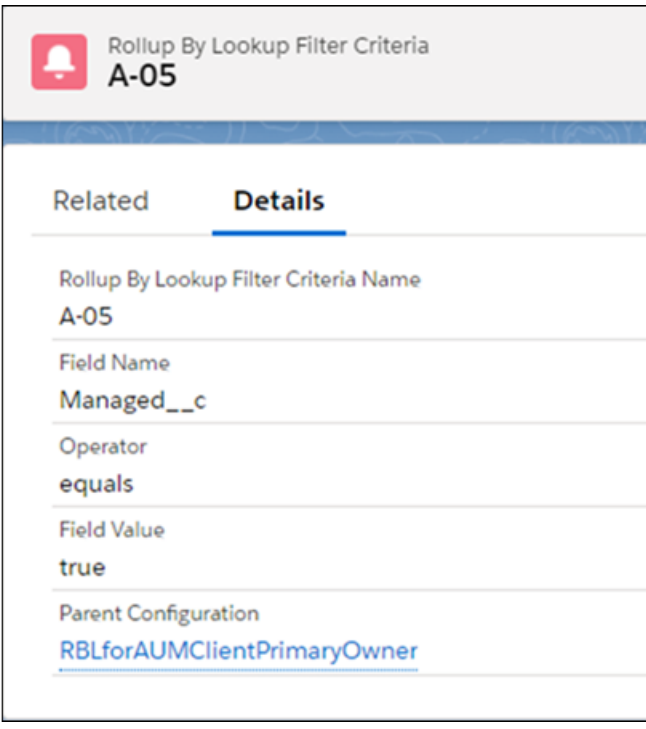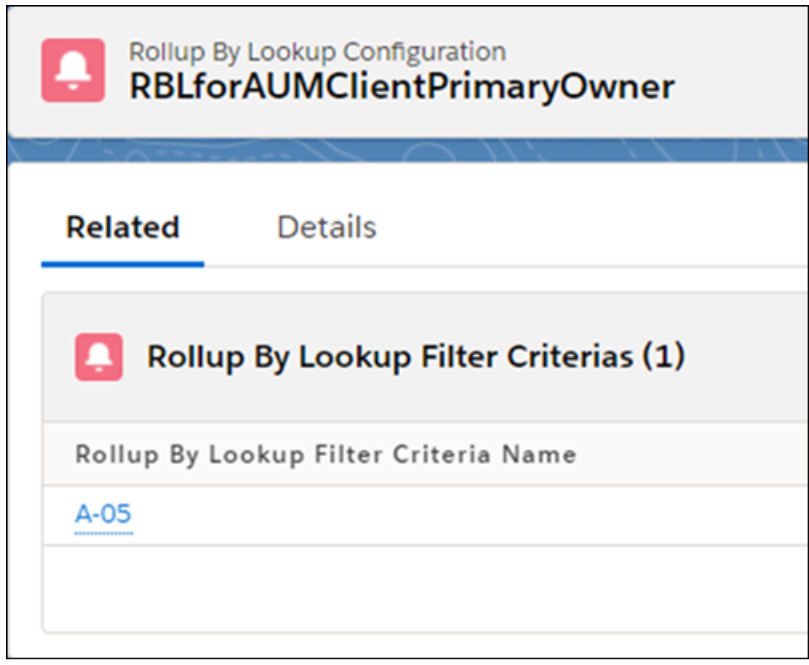
Table 19: Rollup By Lookup Filter Criteria Fields

Name	Description	Example
Field Name	The field to evaluate.	In Financial Services Cloud, the Managed__c indicates whether a financial account is managed. RBLforAUMClientPrimaryOwner can only be triggered for managed financial accounts. In this case RBLforAUMClientPrimaryOwner is only triggered when Managed__c must equals true
Operator	The operation for the criteria.	
Field Value	The value used to evaluate the criteria.	
Parent Configuration	The Rollup By Lookup Configuration that the filter criteria applies to.	

Packaged Rollup By Lookup Configurations

Financial Services Cloud supports these packaged RBL configurations.

There are three types of RBL configurations:

- Household. These group-level rules use the Household__c custom field on the following objects: Assets and Liabilities, Claims, Financial Accounts, and Insurance Policies. They aggregate information at the household level.

- Financial Account. These client-level rules use the PrimaryOwner__c and JointOwner__c custom fields on the Financial Account and Assets and Liabilities objects. They aggregate information for the primary owner and for a single joint owner.

- Financial Account Role. These client-level rules use the RelatedAccount__c custom field on the Financial Account Role object. They aggregate Financial Account information for the primary owner and for multiple joint owners.

📝 **Note:** All financial account (FA) type rules have corresponding financial account role (FAR) type rules to support rollups for multiple joint owners. You can enable either the FA or FAR version of the RBL rule, but not both. For example, you can enable RBLForFARForFinAcctsClientPrimaryOwner instead of RBLForFinAcctsClientPrimaryOwner.

📝 **Note:** FA, FAR, and HH types often share the Account rollup field for primary owner. For example, RBLforAUMClientPrimaryOwner (FA), RBLForFARforAUMClientPrimaryOwner (FAR), and RBLforAUMHH (HH) rules all roll up to the TotalAUMPrimaryOwner__c field on the Account object. As a result, you can activate only one of these rules at a time. Otherwise inaccurate aggregations can occur.

📝 **Note:** All group or household (HH) type rules support RBL calculations for the Primary Owner's Primary Group only.

⚠️ **Warning:** We don't recommend or provide support for creating or customizing Financial Services Cloud RBL rules.

📝 **Note:** RBL rules require processing power. To optimize performance, only activate those rules that support your business needs.

Table 20: RBL Rules

Rule Description	Type	Object	Rolled Into
RBLforAUMClientJointOwner Client-level aggregation of all Financial Accounts with Managed set to True where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalAUMJointOwner__c
RBLforAUMClientPrimaryOwner Client-level aggregation of all Financial Accounts with Managed set to True where Client is Primary Owner on the Financial Account. Denotes Assets under Management.	FA	Financial Account	TotalAUMPrimaryOwner__c
RBLforAUMHH Group-level aggregation of all Financial Accounts balances with Managed set to True. Denotes assets under management.	HH	Financial Account	TotalAUMPrimaryOwner__c
RBLForBankingClientJointOwner Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is Joint Owner on	FA	Financial Account	TotalBankDepositsJointOwner__c

Rule Description	Type	Object	Rolled Into
the Financial Account. One Joint Owner only.			
RBLForBankingClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalBankDepositsPrimaryOwner__c
RBLForBankingHH Group-level aggregation of all Financial Account balances with record type Banking Account, Checking Account, and Savings Account.	HH	Financial Account	TotalBankDepositsPrimaryOwner__c
RBLForClaimPaidHH Group-level aggregation of total amount paid for claims raised against policies owned by the policyholder's primary household. This rollup includes the amount paid for a claim only if the associated policy is active.	HH	Claim	TotalClaimAmountPaid__c
RBLForFARforAUMClientJointOwner Client-level aggregation of all Financial Accounts with Managed set to True where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalAUMJointOwner__c
RBLForFARforAUMClientPrimaryOwner Client-level aggregation of all Financial Accounts with Managed set to True where Client is designated as the Primary Owner on Financial Account Role. Summary denotes Assets under Management.	FAR	Financial Account Role	TotalAUMPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
RBLForFARForFinAcctsClientHeldJointOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalHeldFinAcctsJointOwner__c
RBLForFARForFinAcctsClientHeldPrimaryOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalHeldFinAcctsPrimaryOwner__c
RBLForFARForFinAcctsClientJointOwner Client-level aggregation of all Financial Accounts balances where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalFinAcctsJointOwner__c
RBLForFARForFinAcctsClientPrimaryOwner Client-level aggregation of all Financial Accounts balances where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalFinAcctsPrimaryOwner__c
RBLForFARForInsuranceClientJointOwner Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalInsuranceJointOwner__c
RBLForFARForInsuranceClientPrimaryOwner Client-level aggregation of all Financial Accounts with record	FAR	Financial Account Role	TotalInsurancePrimaryOwner__c

Rule Description	Type	Object	Rolled Into
type Insurance Policy where Client is designated as the Primary Owner on Financial Account Role.			
RBLForFARForInsurancePremium Client-level aggregation of all premiums for all Financial Accounts with record type Investment Account where Client is designated as the Related Account on Financial Account Role.	FAR	Financial Account Role	TotalPremium__c
RBLForFARForInvestmentsClientJointOwner Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalInvestmentsJointOwner__c
RBLForFARForInvestmentsClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Banking Account, Checking Account and Savings Account where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForFARForLastTransactionDateHH Group-level summary of the Last Transaction Date for all associated Financial Accounts.	HH	Financial Account Role	LastTransactionDatePrimaryOwner__c
RBLForFARForLastTransactionDateJointOwner Client-level summary of the Last Transaction Date for all associated Financial Accounts where Client is designated as a Joint Owner on Financial	FAR	Financial Account Role	LastTransactionDateJointOwner__c

Rule Description	Type	Object	Rolled Into
Account Role. Multiple Joint Owners supported.			
RBLForFARForLastTransactionDatePrimaryOwner Client-level summary of the Last Transaction Date for all associated Financial Accounts where Client is designated as a Primary Owner on Financial Account Role.	FAR	Financial Account Role	LastTransactionDatePrimaryOwner__c
RBLForFARForTotalBankDepositsJointOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalBankDepositsJointOwner__c
RBLForFARForTotalBankDepositsPrimaryOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is designated as the Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalBankDepositsPrimaryOwner__c
RBLForFARForTotalNumberOfAccountsJointOwner Client-level summary of the number of all associated Financial Accounts where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalNumberOfFinAccountsJointOwner__c
RBLForFARForTotalNumberOfAccountsPrimaryOwner Client-level summary of the number of all associated Financial Accounts where Client is designated as a Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalNumberOfFinAccountsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
RBLForFARForTotalOutstandingCreditJointOwner Client-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, AutoLoan where Client is designated as a Joint Owner on Financial Account Role. Multiple Joint Owners supported.	FAR	Financial Account Role	TotalOutstandingCreditJointOwner__c
RBLForFARForTotalOutstandingCreditPrimaryOwner Client-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, AutoLoan where Client is designated as a Primary Owner on Financial Account Role.	FAR	Financial Account Role	TotalOutstandingCreditPrimaryOwner__c
RBLForFinAcctsClientHeldJointOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalHeldFinAcctsJointOwner__c
RBLForFinAcctsClientHeldPrimaryOwner Client-level aggregation of all Financial Accounts with Held Away set to False where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalHeldFinAcctsPrimaryOwner__c
RBLForFinAcctsClientJointOwner Client-level aggregation of all Financial Account balances where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalFinAcctsJointOwner__c
RBLForFinAcctsClientPrimaryOwner	FA	Financial Account	TotalFinAcctsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
Client-level aggregation of all Financial Account balances where Client is Primary Owner on the Financial Account.			
RBLForFinAcctsHHHeld Group-level aggregation of all Financial Accounts balances with Held Away set to False.	HH	Financial Account	TotalHeldFinAcctsPrimaryOwner__c
RBLForFinAcctsHHTotal Group-level aggregation of all Financial Account balances.	HH	Financial Account	TotalFinAcctsPrimaryOwner__c
RBLForGWPHH Group-level aggregation of total premium for active policies owned by the policyholder's primary household.	HH	Insurance Policy	TotalHouseholdPremiums__c
RBLForInsuranceClientJointOwner Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalInsuranceJointOwner__c
RBLForInsuranceClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Insurance Policy where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalInsurancePrimaryOwner__c
RBLForInsuranceHH Group-level aggregation insurance amounts for all Financial Accounts with record type Insurance Policy.	HH	Financial Account	TotalInsurancePrimaryOwner__c
RBLForInsurancePremiumHH Group-level aggregation premiums of all Financial	HH	Financial Account	TotalPremium__c

Rule Description	Type	Object	Rolled Into
Accounts with record type of Insurance Policy.			
RBLForInvestmentsClientJointOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is Joint Owner on the Financial Account. One Joint Owner only.	FA	Financial Account	TotalInvestmentsJointOwner__c
RBLForInvestmentsClientPrimaryOwner Client-level aggregation of all Financial Accounts with record type Investment Account where Client is Primary Owner on the Financial Account.	FA	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForInvestmentsHH Group-level aggregation of all Financial Account balances with record type Investment Account.	HH	Financial Account	TotalInvestmentsPrimaryOwner__c
RBLForLiabilitiesClientJointOwner Client-level summary of all non-financial liabilities where Client is Joint Owner.	--	Assets and Liabilities	TotalLiabilitiesJointOwner__c
RBLForLiabilitiesClientPrimaryOwner Client-level summary of all non-financial liabilities where Client is Primary Owner.	--	Assets and Liabilities	TotalLiabilitiesPrimaryOwner__c
RBLForLiabilitiesHH Client-level summary of all non-financial liabilities where Client is Primary Owner.	HH	Assets and Liabilities	TotalLiabilitiesPrimaryOwner__c
RBLForNonfinAssetsClientJointOwner Client-level summary of all non-financial assets where Client is Joint Owner.	--	Assets and Liabilities	TotalNonfinancialAssetsJointOwner__c
RBLForNonfinAssetsClientPrimaryOwner	--	Assets and Liabilities	TotalNonfinancialAssetsPrimaryOwner__c

Rule Description	Type	Object	Rolled Into
Client-level summary of all non-financial assets where Client is Primary Owner.			
RBLForNonfinAssetsHH Group-level summary of all non-financial assets.	HH	Assets and Liabilities	TotalNonfinancialAssetsPrimaryOwner__c
RBLForTotalNumberClaimHH Group-level summary of the number of claims raised against policies owned by the policyholder's primary household.This rollup includes a claim only if the associated policy is active.	HH	Claim	ClaimsOnHouseholdPolicies__c
RBLForTotalNumberOfAccountsBankerHH Group-level summary of the number of all associated Financial Accounts.	HH	Financial Account	TotalNumberOfFinAccountsPrimaryOwner__c
RBLForTotalNumberPoliciesHH Group-level summary of the number of active policies owned by the policyholder's primary household.	HH	Insurance Policy	HouseholdPolicies__c
RBLForTotalOutstandingCreditBankerHH Group-level aggregation of total outstanding credit balances of all Financial Accounts with record type Credit Card, Mortgage, HELOC, LoanAccount, or AutoLoan.	HH	Financial Account	TotalOutstandingCreditPrimaryOwner__c
RBLForTotalRevenueBanker Client-level summary of all Revenues.	--	Revenue	TotalRevenue__c

Enable Rollup By Lookup Rules

Enable RBL rules for client- and group-level rollups.

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

2. Click **Manage** next to Wealth Application Config.

3. Click **Edit**.

4. Select **Enable Group Record Rollups** and **Enable Rollup Summary**.

5. Save your changes.

6. Activate the RLB rules that you want to use.

> 📝 **Note:** RBL rules aren't supported for Insurance Policy Participants and Claim Participants.

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

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

> 📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

Enable the RBL Using Data Processing Engine Framework

To enable the new Rollup-by-Lookup (RBL) framework in your Salesforce org, enable the RBL Using Data Processing Engine setting. After you enable the new RBL framework, you can't create, update, or delete any RBL rules in the old framework.

Convert RBL Rules into Data Processing Engine Definitions

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

Manage Data Processing Engine Definitions

After the Rollup-by-Lookup (RBL) rules are converted to Data Processing Engine definitions, you can view or edit them in Data Processing Engine.

Run Data Processing Engine Definitions

You can run Data Processing Engine definitions in many ways. For example, you can use a flow, REST API, or Apex trigger. Use Monitor Workflow Services to track the progress and status of a definition run.

Best Practices for Faster Processing

Before you run Data Processing Engine definitions, understand the best practices.

Enable the RBL Using Data Processing Engine Framework

To enable the new Rollup-by-Lookup (RBL) framework in your Salesforce org, enable the RBL Using Data Processing Engine setting. After you enable the new RBL framework, you can't create, update, or delete any RBL rules in the old framework.

> 📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

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

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

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

Convert RBL Rules into Data Processing Engine Definitions

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

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

> 📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

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

2. Review and assign permissions to work with Data Processing Engine.

   Your Salesforce org and users require permissions and access to create, activate, and run Data Processing Engine definitions. The Analytics Cloud Integration User profile requires Read access on all the objects and fields selected in the Data Source node. The writeback user specified in a Writeback Object node requires Create access on all the target objects and fields selected in the node. For more information, see Permissions to Work with Data Processing Engine.

3. 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.

Manage Data Processing Engine Definitions

After the Rollup-by-Lookup (RBL) rules are converted to Data Processing Engine definitions, you can view or edit them in Data Processing Engine.

> 📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

1. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.

2. Click a definition to view or edit its details.

   You can also activate or deactivate the definition.

Run Data Processing Engine Definitions

You can run Data Processing Engine definitions in many ways. For example, you can use a flow, REST API, or Apex trigger. Use Monitor Workflow Services to track the progress and status of a definition run.

> 📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

Use an Autolaunched Flow to Run a Data Processing Engine Definition

Associate a Data Processing Engine definition with an autolaunched flow. Then run the flow manually or invoke it by Apex, processes, or REST API. You can clone and use the provided Data Processing Sample flow or create a flow according to your requirements.

Associate a Data Processing Engine definition with a schedule-triggered flow. Then specify the date, time, and frequency to run the flow. You can clone and use the provided Schedulable Data Processing Sample flow or create a flow according to your requirements.

You can run Data Processing Engine definitions using REST API or Apex triggers.

SEE ALSO:

Salesforce Help: Monitor Your Data Processing Engine Definitions

Use an Autolaunched Flow to Run a Data Processing Engine Definition

Associate a Data Processing Engine definition with an autolaunched flow. Then run the flow manually or invoke it by Apex, processes, or REST API. You can clone and use the provided Data Processing Sample flow or create a flow according to your requirements.

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

2. Open the Data Processing Sample flow.
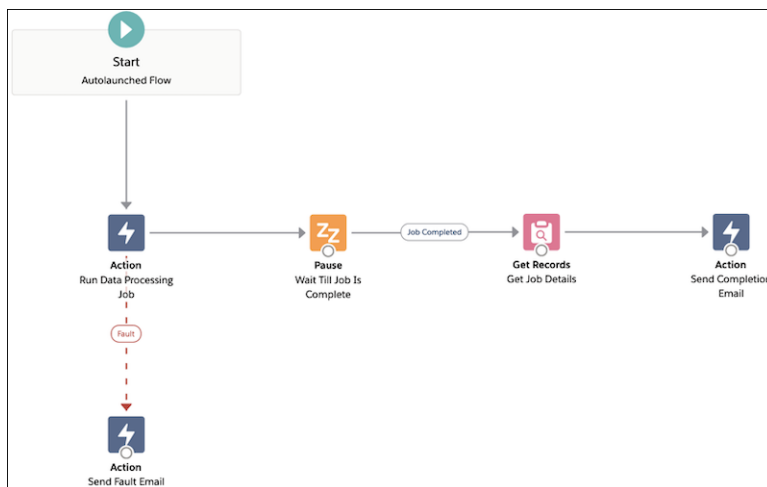
3. Double-click the Run Data Processing Job node to open it.

4. In the Category section, select **Data Processing Engine**.

5. In the Action field, select the data processing engine definition that you want to run.

6. Enter appropriate values for the input variables.

7. Click **Done**.

8. Save your changes, and then activate the flow.

9. To run the flow, click **Run**.

   Or, you can launch the flow using an Apex trigger. Here's an example.

```
//Trigger Code
trigger InitiateCalcJob on MulesoftJob__c (after update) {
for (MulesoftJob__c job: Trigger.new) {
if(Trigger.oldMap.get(job.id).Status__c == 'In Progress' && job.Status__c == 'Completed'){
```

```
RunFlowFuture.runFlow(job.RBL_Job_Name__c);
}
}
}
// Future method code
global class RunFlowFuture {
public static Flow.Interview.Data_Processing_Flow rblFlow {get; set;}

@future
public static void runFlow(String ruleName) {
if(ruleName != null){
Map<String, Object> myMap = new Map<String, Object>();
myMap.put('v1', 'String');
rblFlow = new Flow.Interview.Data_Processing_Flow(myMap);
rblFlow.start();
}
}
}
```

SEE ALSO:

Salesforce Help: Run a Data Processing Engine Definition

Use a Schedule-Triggered Flow to Run a Data Processing Engine Definition

Associate a Data Processing Engine definition with a schedule-triggered flow. Then specify the date, time, and frequency to run the flow. You can clone and use the provided Schedulable Data Processing Sample flow or create a flow according to your requirements.

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

2. Open the Schedulable Data Processing Sample flow.
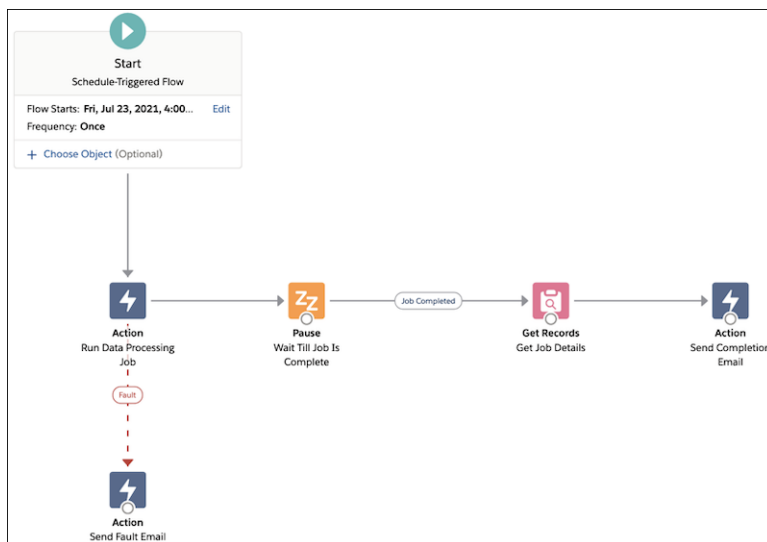
3. In the Start node, specify the date, time, and frequency to run the flow.

4. Double-click the Run Data Processing Job node to open it.

5. In the Category section, select **Data Processing Engine**.

6. In the Action field, select the data processing engine definition that you want to run.

7. Enter appropriate values for the input variables.

8. Click **Done**.

9. Save your changes, and then activate the flow.

   The flow runs according to the set schedule.

SEE ALSO:

   Salesforce Help: Run a Data Processing Engine Definition

Use REST API or Apex Trigger to Run a Data Processing Engine Definitions

You can run Data Processing Engine definitions using REST API or Apex triggers.

Here's an example of how you can run a Data Processing Engine definition using REST API.

```
Api Type:REST
Method :POST
EndPoint :/services/data/v50.0/actions/custom/dataProcessingEngineAction/RBLForAUMHH
Url :
https://mist66.soma.salesforce.com/services/data/v50.0/actions/custom/dataProcessingEngineAction/RBLForAUMHH
Response :[
{"actionName":"RBLForAUMHH",
"errors":null,
"isSuccess":true,
"outputValues":{"batchJobId":"0mdx000000000U1AAI","accepted":true}}
]
```

Here's an example of how you can run a Data Processing Engine definition using an Apex trigger.

```
public class InvokeCalcJobViaRest {
public void invokeJob(String ruleName){
Http h = new Http();
HttpRequest req = new HttpRequest();
req.setEndpoint(URL.getSalesforceBaseUrl().toExternalForm() +
'/services/data/v50.0/actions/custom/dataProcessingEngineAction/'+ruleName);
req.setBody('{"inputs":[{}]}');
req.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
req.setHeader('Content-Type', 'application/json');
req.setMethod('POST');
HttpResponse res = h.send(req);
System.debug(res);
}
}
```

Best Practices for Faster Processing

Before you run Data Processing Engine definitions, understand the best practices.

📝 **Note:** Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

- If you're using person accounts in your org, disable updates to the Primary Contact field on the Account object.
- Disable the triggers on target objects. Or, you can configure your RBL users (users who run the RBL rules) to bypass the triggers. Disabling or bypassing the triggers improves the write-back performance.
- Group your Data Processing Engine definitions based on source and write-back combinations.

Rollup by Lookup Examples
Real-world examples of using the Rollup by Lookup (RBL) framework in Financial Services Cloud to perform high-volume and complex calculations.

SEE ALSO:

Financial Services Cloud Administrator Guide: Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud
Salesforce Help: Data Processing Engine Best Practices

Rollup by Lookup Examples

Real-world examples of using the Rollup by Lookup (RBL) framework in Financial Services Cloud to perform high-volume and complex calculations.

Switch to the enhanced RBL framework to use the superior processing power of CRM Analytics for faster calculation of RBL rules. The RBL framework lets you convert your existing RBL rules into Data Processing Engine definitions. These high-performance definitions significantly reduce the processing time to aggregate financial information. The Data Processing Engine gives you greater flexibility when defining or modifying RBL rules.

The RBL framework is highly scalable, configurable, and helps deliver better performance. It enables you to:

- Create your own rules based on both standard and custom objects.
- Group rules to increase efficiency.

Two RBL framework walkthroughs guide you with step-by-step instructions to execute the RBL rules.

Calculate Total Household Portfolio Value
Here's a step-by-step guide to roll up the financial account balances for each household. This example considers all the accounts that are part of the household and all the financial accounts that belong to each account in the rollup operation.

Group Rules to Optimize the Calculations
Step-by-step guide to group rules and optimize the rollup of cash balances of all financial accounts to the household.

Calculate Total Household Portfolio Value
Here's a step-by-step guide to roll up the financial account balances for each household. This example considers all the accounts that are part of the household and all the financial accounts that belong to each account in the rollup operation.

- The Rollup by Lookup (RBL) framework is available and enabled.

  For more information, see Enable the RBL Using Data Processing Engine Framework on page 416.

- Familiarity with data transformation operations such as joins and appends.
- Familiarity with adding formulas to RBL rules.

Let's say that a Bank A has a large set of customers modeled as Person Accounts and that these customers have one or more Financial Accounts. Also, these customers form a part of their households, which are Accounts.

The requirement is to roll up the financial account balances for each household by including:

- All the accounts that are part of the household
- All the financial accounts that belong to each account

To calculate the total household portfolio value, you can create a DPE definition to aggregate the financial accounts of a household using the household__c field and display the sum on the household record."

The DPE plan to achieve the requirement:

1. Create two data sources with the source objects as Accounts and Financial Accounts.

2. Filter the results of the Accounts data source to consider only the RecordType, IndustriesHousehold.

3. Create an aggregate on Financial Accounts.

   a. Groupby the household id field.

   b. Sum the balance field.

4. Create a left outer join to join the results of steps 2 and 3.

5. Writeback with the results of step 4 to the Accounts data source.

   📝 Note: The field names that you come across in this example may vary in the org that you are trying to execute the DPE definition. For example they maybe appended with a namespace.

1. Create a data processing engine definition.

   a. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.

   b. Click **New**.

   c. Enter the name of the definition as `Total Household Portfolio Value`.

   d. Click **Create**.

2. Create a data source (Accounts) and select its objects and fields.

   a. On the Data Processing Engine definition page, click **New Data Source**.

   b. Enter the name as `Account and Recordtype`.

   c. Save your changes.

   d. From the Source Object dropdown list, search for and select **Account**.

   e. Click **Select Fields**.

   f. Select the fields **Id** and **Balance__c**.

      📝 Note: Balance__c is a custom field in the Accounts object to which we will roll up the financial account balance value of each household.

   g. Enter the alias name for **Id** as `AccountId` and for **Balance__c** as `AccountBalance`.

   h. Click **Done**.

3. Select the related objects and fields for the Account and Recordtype data source.

   a. Click **Add Related Object**.

   b. Select the **RecordType** object.

   c. Click **Select Fields**.

   d. Select the **DeveloperName** and **Id** fields.

   e. Enter the alias name for **Id** as `RecordTypeId` and for **DeveloperName** as `DeveloperName`.

f. Click **Done**.

g. Save your changes.

4. Create a data source (Financial Account) and select its objects and fields.

a. On the Data Processing Engine definition page, click **New Data Source**.

b. Enter the name as *Financial Accounts*.

c. Save your work.

d. From the Source Object list, search for and select **Financial Account**.

e. Click **Select Fields**.

f. Select the **Household__c** and **Balance__c** fields.

g. Enter the alias name for **Household__c** as *FAHouseholdId* and for **Balance__c** as *FABalance*.

h. Click **Done**.

i. Save your changes.

5. Create a new node to filter the Account and Recordtype data source.

a. On the Data Processing Engine definition page, click **New Node**.

b. In the Select Node Type dropdown list, select **Filter**.

c. Enter the name as *Filter Household Recordtypes*.

d. Click **Create**.

e. Configure the filter.

Configure the filter so that the result of the Filter Household Recordtypes data source is a filtered set of records with RecordType as IndustriesHousehold. Define these filter conditions.

- Source Node: Account and Recordtype.
- Select Records When: All Conditions are met (AND).
- Field: DeveloperName
- Operator: Equals
- Type: Field
- Value: IndustriesHousehold

f. Click **Done**.

g. Save your changes.

Here's what the filter conditions look like in the Filter Household Recordtypes data source page.

6. Create a node to aggregate the values of the FAbalance fields in the Financial Accounts data source.

a. On the Data Processing Engine definition page, click **New Node**.

b. In the Select Node Type dropdown list, select **Group and Aggregate**.

c. Enter the name as `Aggregate FA Balances`.

d. Click `Create`.

e. From the Source Node list, search for and select **Financial Accounts**.

f. Click **Select Group Fields**.

g. Select the **Household__c** field.

h. Click **Add Aggregate** and define a new aggregate.

Under the Aggregate section, configure the aggregate as follows:

- Alias: Aggregation
- Function: Sum
- Aggregate Field: FABalance

i. Click **Done**.

j. Save your changes.

Here's what the aggregation definitions look like in the Aggregate FA Balances data source page.

7. Create a node to join the results of the Filter Household Recordypes node and the Aggregate FA Balances node.

a. On the Data Processing Engine definition page, click **New Node**.

b. In the Select Node Type dropdown list, select **Join**.

c. Enter the name as `Join FA Aggregates and Household`.

d. Click `Create`.

e. Configure the join.

Define the following as join conditions.

- Join Type: Left Outer
- First Node: Filter Household Recordypes
- Fields (first node): AccountId
- Second Node: Aggregate FA Balances
- Fields (second node): Aggregation

f. Map the join fields.

Under the Map Fields section, map fields from the first node to fields from the second node.

- Map the **Id** field from the filter to the **Household__C** field from the Financial Accounts data source.

Here's what the join conditions look like in the Join FA Aggregates and Household data source page.

8. Create a node to write back the results to the Accounts data source.

   a. On the Data Processing Engine definition page, click **New Node**.

   b. In the Select Node Type dropdown list, select **Writeback**.

   c. Enter the name as `Account Writeback`.

   d. From the Source Node list, search for and select **Join FA Aggregates and Household**.

   e. In the Action Type dropdown list, select **Upsert**.

   f. In the Target Object dropdown list, select **Account**.

   g. Define the field mappings.

      Under the Field Mapping section, map the Source Node fields to Target fields.

      - Map the **AccountId** field from the join to the **Account ID** field in the Accounts data source.

      - Map the **AggregateBalance** field from the join to the **Balance** field in the Accounts data source.

   Here's what the writeback configurations look like in the Account Writeback data source page.
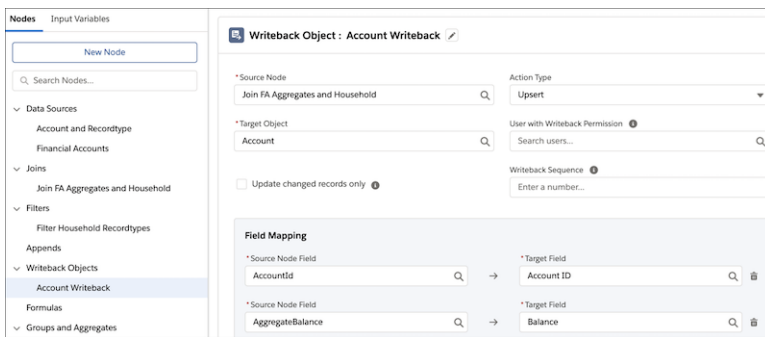
9. Save your changes.

You can now activate and execute the RBL rule to calculate the total household portfolio value. After you activate the rule, you can also invoke them as actions in flows to orchestrate processes.

SEE ALSO:

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

Group Rules to Optimize the Calculations

Step-by-step guide to group rules and optimize the rollup of cash balances of all financial accounts to the household.

- Rollup by Lookup (RBL) framework is available and enabled.

For more information, see Enable the RBL Using Data Processing Engine Framework on page 416.

- Familiarity with data transformation operations such as joins and appends.
- Familiarity with adding formulas to RBL rules.

Let's say there's a requirement to roll up cash balances of all financial accounts to the household with these two rules.

- The cash balances are stored in the cash balance field of the Financial Account object.
- The rollup value is stored in the cash balance field of the Accounts object.

You want to group these two rules in a single Data Processing Engine (DPE) definition to optimize the rollup operation.

The Data Processing Engine Design (DPE) plan to achieve the requirement:

1. Create two data sources with source objects as Accounts and Financial Accounts.

2. Filter the results of the Accounts data source to consider only the RecordType, IndustriesHousehold.

3. Aggregate the Financial Accounts with two aggregates:

    a. Groupby the household id field and sum the balance field.

    b. Groupby the household id field and sum the cash balance field.

4. Create a left outer join to join the results of steps 2 and 3.

    This join operation results in a single table that includes the Account Id fields, the aggregate of the balance fields, and the aggregate of the cash balance fields.

5. Writeback with the results of step 4 to the Accounts data source.

> **Note:** The field names that you come across in this example may vary in the org that you are trying to execute the DPE definition. For example they maybe appended with a namespace.

1. Create a data processing engine definition.

    a. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.

    b. Click **New**.

    c. Enter the name of the definition as `Group Total HH Portfolio Value and Calculate`.

    d. Click **Create**.

2. Create a data source (Accounts) and select its objects and fields.

    a. On the Data Processing Engine definition page, click **New Data Source**.

    b. Enter the name as `Account and Recordtype`.

    c. Save your changes.

    d. From the Source Object dropdown list, search for and select **Account**.

    e. Click **Select Fields**.

    f. Select the **Id** and **Balance__c** fields.

    > **Note:** Balance__c is a custom field in the Accounts object to which we will roll up the total cash balance.

    g. Enter the alias name for **Id** as `AccountId` and for **Balance__c** as `AccountBalance`.

    h. Click **Done**.

3. Select the related objects and fields for the Account and Recordtype data source.

     a. Click **Add Related Object**.

     b. Select the **RecordType** object.

     c. Click **Select Fields**.

     d. Select the **DeveloperName** and **Id** fields.

     e. Enter the alias name for **Id** as `RecordTypeId` and for **DeveloperName** as `DeveloperName`.

     f. Click **Done**.

     g. Save your changes.

4. Create a data source (Financial Account) and select its objects and fields.

     a. On the Data Processing Engine definition page, click **New Data Source**.

     b. Enter the name as `Financial Accounts`.

     c. Save your work.

     d. From the Source Object list, search for and select **Financial Account**.

     e. Click **Select Fields**.

     f. Select the **Household__c**, **Balance__c**, and **CashBalance__c** fields.

     g. Enter the alias name for **Household__c** as `FAHouseholdId`, for **Balance__c** as `FABalance`, and for **CashBalance__c** as `FACashBalance`.

     h. Click **Done**.

     i. Save your changes.

5. Create a node to filter the Account and Recordtype data source.

     a. On the Data Processing Engine definition page, click **New Node**.

     b. In the Select Node Type dropdown list, select **Filter**.

     c. Enter the name as `Filter Household Recordtypes`.

     d. Click **Create**.

     e. Configure the filter.

     Configure the filter so that the result of the Filter Household Recordtypes data source is a filtered set of records with RecordType as IndustriesHousehold. Define these filter conditions.

      • Source Node: Account and Recordtype

      • Select Records When: All Conditions are met (AND)

      • Field: DeveloperName

      • Operator: Equals

      • Type: Field

      • Value: IndustriesHousehold

     f. Click **Done**.

     g. Save your changes.

     Here's what the filter conditions look like in the Filter Household Recordtypes data source page.

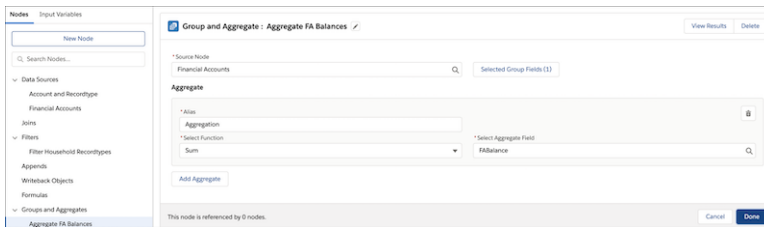6. Create a node to aggregate the values of the FAbalance fields in the Financial Accounts data source.

   a. In the Data Processing Engine definition page, click **New Node**.

   b. In the Select Node Type dropdown list, select **Group and Aggregate**.

   c. Enter the name as `Aggregate FA Balances`.

   d. Click **Create**.

   e. From the Source Node list, search for and select **Financial Accounts**.

   f. Click **Select Group Fields**.

   g. Select the **Household___c** field.

   h. Click **Add Aggregate** and define the first aggregate.

      Under the Aggregate section, configure the aggregate as follows:

      - Alias: AggregatedSum

      - Function: Sum

      - Aggregate Field: Balance___c

   i. Click **Add Aggregate** again and define the second aggregate.

      Under the Aggregate section, configure the aggregate as follows:

      - Alias: CashBalance

      - Function: Sum

      - Aggregate Field: CashBalance___c

   j. Click **Done**.

   k. Save your changes.

   Here's what the aggregation definitions look like in the Aggregate FA Balances data source page.

7. Create a node to join the results of the Filter Household Recordypes node and the Aggregate FA Balances node.

   a. On the Data Processing Engine definition page, click **New Node**.

    b. In the Select Node Type dropdown list, select **Join**.

    c. Enter the name as `Join FA Aggregates and Household`.

    d. Click **Create**.

    e. Configure the join.
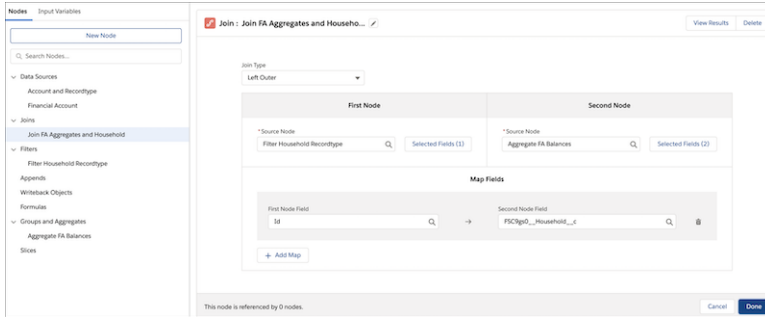
        Define the following as join conditions.

- Join Type: Left Outer
- First Node: Filter Household Recordypes
- Fields (first node): AccountId
- Second Node: Aggregate FA Balances
- Fields (second node): AggregatedSum and CashBalance

    f. Map the join fields.

        Under the Map Fields section, map fields from the first node to fields from the second node.

- Map the **Id** field from filter to the **Household__C** field from the Financial Accounts data source.

    Here's what the join conditions look like in the Join FA Aggregates and Household data source page.


8. Create a node to write back the results to the Accounts data source.

    a. On the Data Processing Engine definition page, click **New Node**.

    b. In the Select Node Type dropdown list, select **Writeback**.

    c. Enter the name as `Account Writeback`.

    d. From the Source Node list, search for and select **Join FA Aggregates and Household**.

    e. In the Action Type dropdown list, select **Upsert**.

    f. In the Target Object dropdown list, select **Account**.

    g. Define the field mappings.

        Under the Field Mapping section, map the Source Node fields to Target fields.

- Map the FAHouseholdId field to the Id field.
- Map the AggregateSum field to the Balance__c field.
- Map the CashBalance field to the Total_Primary_Cash_Value__c field.

    Here's what the writeback configurations like in the Account Writeback data source page.
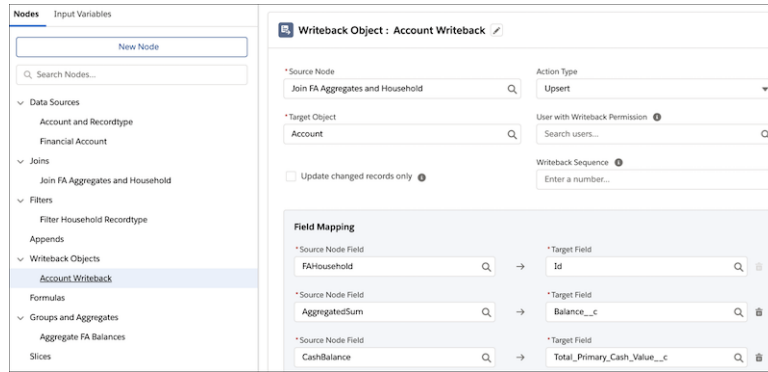
9. Save your changes.

You can now activate and execute the RBL rule to group rules and optimize the calculations. After you activate the rule, you can also invoke them as actions in flows to orchestrate processes.

SEE ALSO:

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

Record Rollups, Rollups By Lookup, and Data Loads

Control record rollups and rollups by lookup to maximize data load performance.

Manage Rollups to Accelerate Data Loads

Changes made through the user interface to a single Financial Account or Account Contact Relationship membership record trigger immediate RBL updates. Changes made via bulk operations or the Group Builder queue the updates which means that data loads more slowly when rollups and RBL are enabled. Before initiating insert or update operations, you can disable rollups to speed up data loading. You can control whether rollup-by-lookup rules or record rollups are queried and calculated for your org or for a specific profile or user.

Force Rollup By Lookup Recalculations

You can recalculate the RBL rules for your organization from the UI or by using Apex code.

Manage Rollups to Accelerate Data Loads

Changes made through the user interface to a single Financial Account or Account Contact Relationship membership record trigger immediate RBL updates. Changes made via bulk operations or the Group Builder queue the updates which means that data loads more slowly when rollups and RBL are enabled. Before initiating insert or update operations, you can disable rollups to speed up data loading. You can control whether rollup-by-lookup rules or record rollups are queried and calculated for your org or for a specific profile or user.

> ⛔ **Important:** Enable rollups during Financial Account delete operations to ensure that rollups are correctly calculated and updated on the target records.

1. From Setup, enter `Custom Settings` in the Quick Find box, then select **Custom Settings**.

2. Next to Wealth Application Config, click **Manage**.

3. Click **Edit** to modify the Default Organization Level Value setting.

> **Note:** If a Default Organization Level isn't defined, click **New** to define a new Default Organization Level Value.

4. Deselect **Enable Rollup Summary** and **Enable Group Record Rollup**.

> **Note:** You can temporarily disable the settings at your Default Organization Level Value, but enable them after completing the data load operation. You can also create or modify user- or profile-level settings in the Setup Owner related list below the Default Organization Level Value. For example, if you're using an Integration User or profile for data loads with ETL tools, you can permanently disable the settings for the Integration User or profile using the Setup Owner related list.

5. Save your changes.

6. Insert and update Financial Accounts using Data Loader.

7. Select **Enable Rollup Summary** and **Enable Group Record Rollup**.

   This step is optional if you disabled the settings only for a user or profile.

8. Run **GroupAssignmentBatchable**.

> **Important:** If you deselect the **Enable Rollup Summary** setting, new and modified financial accounts are not displayed or modified on the Group and Household related lists. After you run a **GroupAssignmentBatchable** job, the household financial account related lists display the Financial Account records at the household level.

> **Note:** If you enabled the new Record Rollup Optimization (Beta) org preference, use the new **HouseholdAssignmentBatchable** batch job instead of **GroupAssignmentBatchable** to roll up records in batches.

9. Run **RunRBLBatchable**.

10. Save your changes.

Force Rollup By Lookup Recalculations

You can recalculate the RBL rules for your organization from the UI or by using Apex code.

[Use Run Rules to Recalculate Rollups by Lookup](#)
Use Run Rules on the Rollup By Lookup Configurations tab to run recalculations.

[Recalculate Rollup By Lookup Summaries with Apex](#)
Use Apex code recalculate Rollup By Lookup summaries.

Use Run Rules to Recalculate Rollups by Lookup

Use Run Rules on the Rollup By Lookup Configurations tab to run recalculations.

> **Note:** To recalculate rollup summaries for a small subset of data, either modify the underlying Financial Accounts or modify the Account Contact Relationship.

To recalculate the RBL summaries from the UI.

1. From the App Launcher, find and select **Rollup By Lookup Configurations**.

2. Change the list view to **All**.

3. Click **List View Controls** ⚙.

4. Click **Select Fields to Display**.

5. Under Available Fields, select **Active**, and add the selected field to **Visible Fields**.

6. Save your changes.

7. Select RBL rule(s) to be re-calculated from the list view.

> 📝 **Note:** Note: Activate RBL rules before you run them.

8. Click **Run Rules**.

Recalculate Rollup By Lookup Summaries with Apex

Use Apex code recalculate Rollup By Lookup summaries.

> 📝 **Note:** To recalculate rollup summaries for a small subset of data, either modify the underlying Financial Accounts or modify the Account Contact Relationship.

To recalculate the RBL summaries using Apex code.

1. Call a global class with the global constructor RollupRecalculationBatchable through Apex code.

   > 📝 **Note:** When running the RBL rules through Apex code, your list must not:
   > - Be null or empty
   > - Contain inactive, invalid, or duplicate RBL configuration IDs

2. Create a list of IDs of your active Rollup By Lookup Configuration objects in the order that you want them to run.

3. Create an instance of RollupRecalculationBatchable, and pass your list of IDs to it.

4. Execute the batch job with Database.executeBatch. After you execute this batch job, future rollups are automatically executed.

> 👁 **Example:** Here's sample Apex code:

```
// Create your list of IDs
List<Id> rollupsToRun = new List<Id>();
List<FinServ__RollupByLookupConfig__c> queriedRollups = [SELECT Id FROM
FinServ__RollupByLookupConfig__c WHERE FinServ__Active__c = true];
for (FinServ__RollupByLookupConfig__c rollup : queriedRollups) {
rollupsToRun.add(rollup.Id);
}

// Create an instance of RollupRecalculationBatchable
FinServ.RollupRecalculationBatchable job = new
FinServ.RollupRecalculationBatchable(rollupsToRun);

// Run the rollups
Database.executeBatch(job);
```

SEE ALSO:

> *Apex Developer Guide* : Batch Apex

Service Process Automation

Service Process Automation helps you streamline and automate service-related operations. The core component of Service Process Automation is Service Process Studio, a framework that lets you design case-driven service processes, starting from request intake to fulfillment. Each service process includes an OmniScript for request intake through assisted and self-service channels and it features flows for streamlined fulfillment.

Service Process Studio

Service Process Studio helps you design customer service processes quickly and efficiently. Service agents can launch these service processes and get started with the customer service operations.

Retail Banking Service Processes for Financial Services Cloud

Implementing and executing effective service processes is a key factor for customer satisfaction. Building service processes and configuring integrations with external systems is a time-consuming and complex task.

Self-Service for Retail Banking Service Processes

Let your customer community users initiate service processes directly from a self-service portal, such as the Financial Services Client Portal. When you make the service processes available with a self-service portal, you allow your customers to raise service process requests at any time, from anywhere.

Self-Service Capabilities in Financial Services Client Portal

Give your clients the ability to manage their financial services needs through a self-service portal. Set up a new Experience Cloud portal using the Financial Services Client Portal template and configure the self-service capabilities. Clients can create and track service requests, schedule and manage appointments, submit loan applications, browse frequently asked questions and knowledge articles, and provide feedback. You can use the Experience Cloud portal as is or you can embed this portal into existing internet and mobile banking systems through single sign-on.

Service Process Studio

Service Process Studio helps you design customer service processes quickly and efficiently. Service agents can launch these service processes and get started with the customer service operations.

Use Service Process Studio to create a service process definition to configure and organize multiple actions or tasks required to design the request intake and fulfill the request. A service process definition consists of data attributes, request form, business logic, fulfillment flow, and integration definition details.

After you activate a service process definition, you can associate an Action Launcher deployment for this service process, and service agents can launch this process from a record details page.

SEE ALSO:

Service Process Studio

Retail Banking Service Processes for Financial Services Cloud

Implementing and executing effective service processes is a key factor for customer satisfaction. Building service processes and configuring integrations with external systems is a time-consuming and complex task.

Service agents can launch these service processes and get started with critical customer service operations. Customer community users can directly launch these service processes from a self-service portal and quickly submit their service process requests.

Address Update Service Process

The Address Update service process allows your customers to update their addresses so that they receive important communications and statements at the correct location.

Fee Reversal Service Process

The Fee Reversal service process allows your customers to request a reversal of fees charged to their accounts.

Transaction Dispute Management

Transaction Dispute Management provides a streamlined process for your users to capture and submit customer disputes related to financial transactions. Use Service Process Studio to quickly configure the Transaction Dispute Management service process to give your users a guided step-by-step process for capturing customer disputes. Let your users launch the dispute intake request directly from a customer's record page in Salesforce.

Notify Travel Plans Service Process

The Notify Travel Plans service process simplifies the travel experience for your customers, enabling them to provide notice about their upcoming trips. This information helps you to know that the transactions are legitimate, and avoid any card-related issues during a customer's trip.

Update Email or Phone Service Process

The Update Email or Phone service process allows your customers to maintain accurate contact information, receive timely information, and enhance security through proper communication.

Stop Check Payment Service Process

The Stop Check Payment service process allows your customers to cancel a check payment, which isn't processed yet. They can cancel a check payment if there's a theft, cancellation, or any other reasons for which the payment is to be stopped.

Report and Replace Cards Service Process

The Report and Replace Cards service process allows your customers to report stolen cards, block cards, and start a replacement card request.

Order Checkbook Service Process

The Order Checkbook service process allows your customers to order a checkbook. Customers can choose the number of checks required in the checkbook and the preferred delivery mode while ordering.

Request Statement Copies Service Process

The Request Statement Copies service process allows your customers to request statement copies for their financial accounts. They can choose to receive their statement copies to a preferred address either through email or post.

Transfer Funds to Own Account Service Process

The Transfer Funds to Own Account service process allows your customers to transfer funds between their financial accounts that are either within the same bank or with a different bank.

Manage Standing Instructions Service Process

The Manage Standing Instructions service process allows your customers to add or modify instructions for setting up recurring and timely payments.

Manage Beneficiaries Service Process

The Manage Beneficiaries service process allows your customers to add, modify, or delete beneficiaries who receive the benefit of funds from their financial accounts.

Request Loan Payoff Statement Service Process

The Request Loan Payoff Statement service process simplifies the way customers can manage and repay their loans.

Add Your Company Logo to an Email Template

Add your company logo to Salesforce Classic documents and incorporate the logo into an email template. You can later use the email template with retail banking service processes for customer interactions.

Customize the Page Layouts with Source System ID and Card Number

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to Card page layouts. The Source ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration

To get financial accounts information from a core banking system, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment

The OmniScript for each service process guides users in capturing a customer service request. Agents can launch these OmniScripts from the record details page of a person account to capture a service request.

Address Update Service Process

The Address Update service process allows your customers to update their addresses so that they receive important communications and statements at the correct location.

Streamline Updating Client Addresses Using Service Process Studio

Let your users quickly update client addresses using the Address Update Service Process. Use the Service Process Studio to configure the Address Update service process to give your users an easy-to-follow process for updating client addresses.

Request an Address Update for a Client

Submit a request to complete an address update change for a client using the Address Update service process.

Streamline Updating Client Addresses Using Service Process Studio

Let your users quickly update client addresses using the Address Update Service Process. Use the Service Process Studio to configure the Address Update service process to give your users an easy-to-follow process for updating client addresses.

Note: The Financial Services Cloud managed package must be installed in Salesforce before you can complete these steps.

Assign Permissions to Users

To configure the Address Update Service Process, assign permissions.

Connect to MuleSoft and Create a Named Credential

Turn on Financial Services Cloud Integrations and create a MuleSoft named credential to connect your external banking system to Salesforce.

Create an Integration Definition

The Address Update Service Process uses fsc_address_update_integration_definition integration definition. It calls the API to update the client's address and the financial accounts in the core banking system. You can use this integration definition, or create your own.

Clone and Activate the OmniScript

Clone and activate the FSCAddressUpdate/CreateRequest OmniScript. This OmniScript gives your users a guided path for completing the address update request intake process of the address update service process. Use the OmniScript as it is, or customize it to meet the needs of your business.

Clone and Activate the Address Update Salesforce Flow

Use the Address Update Salesforce Flow Orchestration to show your users step-by-step instructions to submit an address update for a client. You can customize the flow to meet your business needs.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Create an Address Update Service Process

Create a unique version of the Address Update service process and enter the details.

Add Data Attributes

Optionally, create data attributes to store information from a client. The Address Update service process has predefined data attributes. You can create more as needed to meet the needs of your business.

Update the Address Update Salesforce Flow for Service Catalog Requests

To trigger the Address Update Salesforce flow only for updates in response to Service Catalog Requests, connect the SvcCatalogItemDefinitionID field to your Address Update service process. Update the Start element in the cloned Address Update Salesforce flow and add your Address Update service process API name. When a case is created, a Service Catalog Request is created.

Update the Address Update OmniScript

Update the name of the Service Process in the cloned version of the FSCAddressUpdate/CreateRequest OmniScript to your Service Process Definition API Name.

Create Document Types

Set up document types that let your users select a supporting documentation type that confirms the client's new address.

Create a Decision Matrix Set

Create a decision matrix and add your address update service process name and document types. The Address Update Service process uses the Business Rules Engine to create rules using decision matrices and expression sets to show a list of valid document types that a user can select. Document types are a list of supporting documentation that a user can request from a client to validate the client's new address.

Create an Expression Set

Create an expression set to read the values in the decision matrix and populate the values in the document type.

Create Address Update Action

Create an action launcher deployment that uses the service process template to give your users quick access to the Address Update OmniScript. If you have an existing action launcher deployment, add the Address Update OmniScript to it.

Customize the Page Layouts With Source System ID

Add the Source System ID field to the Financial Account and Account page layouts. This field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Add the Address Update Action to the Person Account Page

To give your users quick access to the Address Update OmniScript, add the Address Update action launcher component to the person account page layout.

Activate the Address Update Service Process

Confirm the OmniScript, Integration Definition, and Salesforce Flow and activate the Address Update service process.

Configure the Address Update OmniScript

To customize the address update request flow, edit the steps of the Change Address OmniScript.

Required OmniScript Components

Check that the required components are in place in Salesforce to support Address Update Service Process. The Address Update OmniScript calls the following Integration Procedures, DataRaptors, FlexCards, LWCs (Lightning Web Components), and Apex classes.

Assign Permissions to Users

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine	
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete	
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To configure the Address Update Service Process, assign permissions.

1. Assign permission set licenses.

a. In Setup, in the Quick Find box, enter `Users`, then click **Users**.

b. Click a user.

c. In Permission Set License Assignments, click **Edit Assignments**.

d. Select **Industry Service Process**, **Industry Service Excellence**, **OmniStudio, Document Checklist**, **Rule Engine Runtime**, **and Financial Services Cloud Extension**, or **Financial Services Cloud Basic**, or **Financial Services Cloud Standard**.

e. Save your changes.
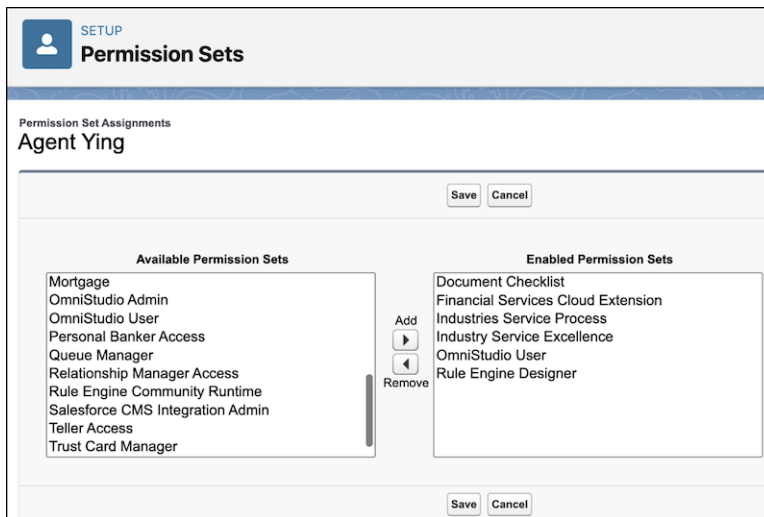
2. Update field level security.

a. In Setup, click **Object Manager**.

b. In the Quick Find box, enter `Case`, then click **Case**.

c. Click **Fields & Relationships**.

d. Click **Account Name**.

e. Click **Set Field-Level Security**.

f. Select **Visible** for the profiles using Address Update Service Process.

g. Deselect Read-Only for the profiles using Address Update Service Process.

h. Save your changes.
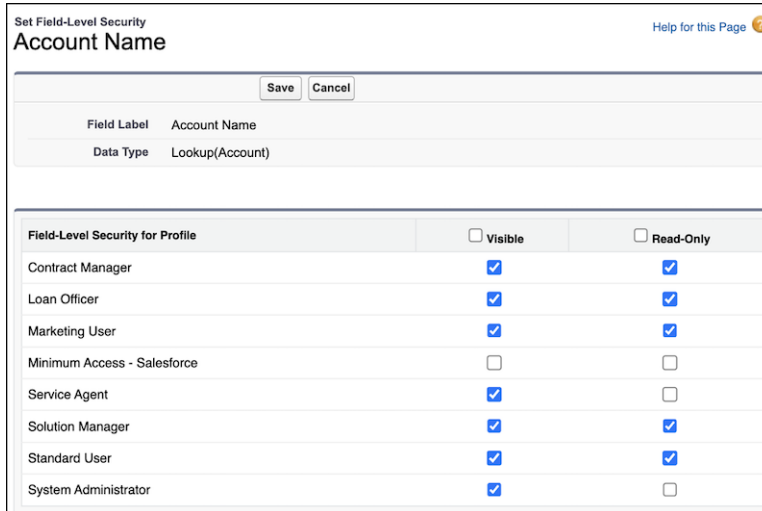
i. Similarly, update the field-level security for the **Case Source** field on the Case object. For the profiles using the Address Update Service Process, select **Visible** and deselect **Read-Only**.

3. Update object permissions.

    a. In Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

    b. Click **Edit**.

    c. In Standard Object Permissions, select **Read**, **Create**, **Edit**, **Delete**, and **View All** for Document Checklist Items object.

    d. Save your changes.

    e. Complete these steps for Cases, Service Catalog Requests, Service Catalog Item Dependencies, Service Catalog Request Related Items, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions, Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, and Decision Matrix Versions objects.

Connect to MuleSoft and Create a Named Credential

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step	

	Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Turn on Financial Services Cloud Integrations and create a MuleSoft named credential to connect your external banking system to Salesforce.

1. In Setup, in the Quick Find box, enter `Integrations Setup`, and then select **Integrations Setup**.

2. In Financial Services Cloud Integrations, click **I accept the terms and conditions**.

3. Turn on **Financial Services Cloud Integrations**.

4. Click **Connect to MuleSoft Instance**.

5. Select a service and click **Next**.

6. Enter your MuleSoft username and password and click **Sign In**.

7. Click **Grant Access to <your username>**. It takes a few minutes for Salesforce to connect to MuleSoft.

8. Locate the API to connect to and click **Enable**.

9. In Setup, in the Quick Find box, enter `Named Credential`, and then select **Named Credential**.

10. Verify that a named credential, FSC_fsc_integrations_V1_0_0, was added for the connected MuleSoft instance.

Create an Integration Definition

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	

	OR
	Financial Services Cloud Standard
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

The Address Update Service Process uses fsc_address_update_integration_definition integration definition. It calls the API to update the client's address and the financial accounts in the core banking system. You can use this integration definition, or create your own.

1. In Setup, in the Quick Find box, enter *Integrations Definitions*, and then select **Integrations Definitions**.

2. Click **+ New**.

3. Create an Integration Definition with these settings:

   a. For Type, select **Apex Defined**.

   b. For Name and Developer name, enter *fsc_address_update_integration_definition*.

   c. Click **Next**.

   d. Selected Apex Class as **fscserviceprocess.AddressUpdateProcessIntegrationProvider**.

   e. Value *FSC_fsc_integrations_V1_0_0*. Save the definition and then click **Activate**.

Clone and Activate the OmniScript

To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Clone and activate the FSCAddressUpdate/CreateRequest OmniScript. This OmniScript gives your users a guided path for completing the address update request intake process of the address update service process. Use the OmniScript as it is, or customize it to meet the needs of your business.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.
   It can take a little time for the OmniScripts app to show.

3. If the Standard OmniStudio Runtime is disabled, turn it on.

4. Select **FSCAddressUpdate/CreateRequest**.
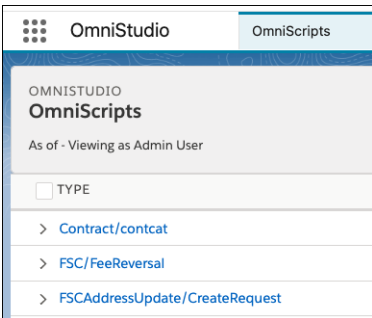
5. Create **New Version**.

6. Click **Activate Version**.

Clone and Activate the Address Update Salesforce Flow

<table>
<tr><td>USER PERMISSIONS</td><td></td><td>EDITIONS</td></tr>
<tr><td>To set up Address Update service process:</td><td>Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine</td><td>Available in: Lightning Experience</td></tr>
<tr><td></td><td>Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All</td><td>Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled</td></tr>
<tr><td></td><td>Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step</td><td></td></tr>
</table>

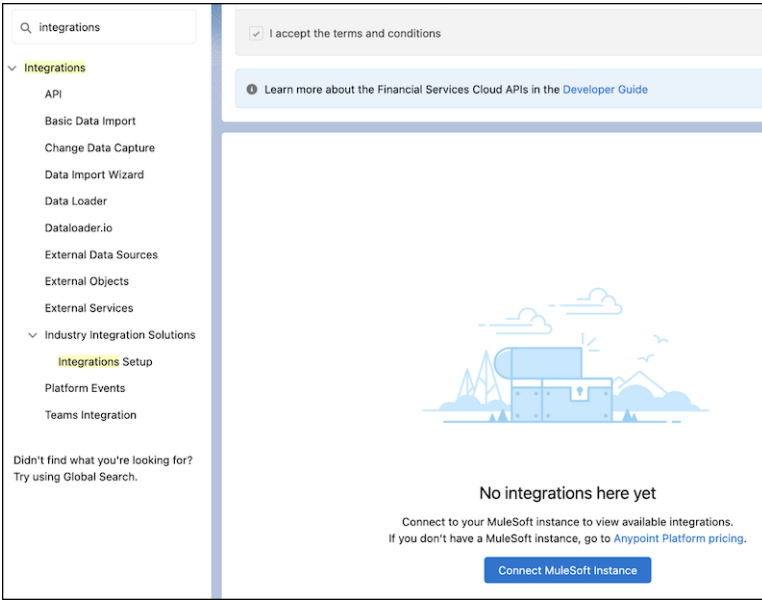|	
	Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
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To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
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Use the Address Update Salesforce Flow Orchestration to show your users step-by-step instructions to submit an address update for a client. You can customize the flow to meet your business needs.

Clone the Process Address Update orchestrate template and activate a new version in Salesforce. The orchestration provides a declarative process automation that contains a sequence of stages and steps. A stage contains interactive and background steps. Interactive steps have an assigned user and execute a designated screen flow. Background steps execute an auto-launched flow that's executed by the system and requires no user interaction. The interactive and background steps are required to fulfill the request for Address Update that is submitted.

The Process Address Update orchestrate allows a user working on a case to review an address update request, submit the change, and either update the case record or notify the case owner that the update failed. The orchestration contains these three business stages:

- Review Address Update: A work item is assigned to a user. They verify the documents submitted by the customers and check the data entered in the request and approve the request.

- Update Address: When the work item is completed by the user, the invoke address update API calls an asynchronous Apex action to update the data in the core banking system. A background flow integrates with the core banking system to update the address of the selected customer and selected financial accounts.

- Update Case Status or Display Error: Updates the case status to closed if the API response is successful. If the API fails, an error message shows to the user and a work item is assigned to the user to update the client's address manually.
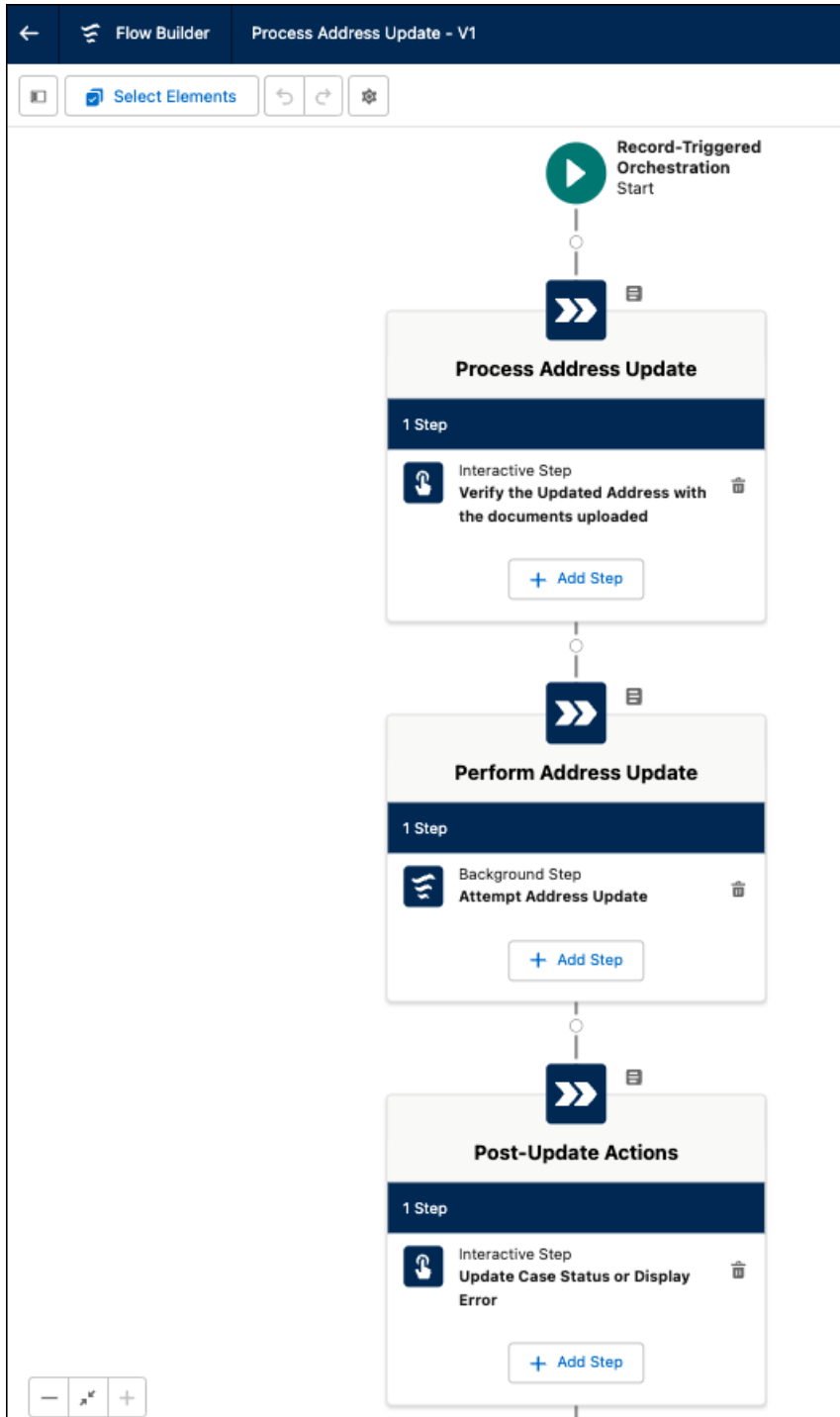
You can customize and add the Review Address Update Salesforce Flow Orchestration to the address update service process.

1. In Setup, in the Quick Find box, enter `Flow`, and then click **Flow**.

2. Click **New Flow**.

3. Click **All + Templates** and select **Flow Orchestration**.

4. Select **Process Address Update** orchestrate and click **Create**.
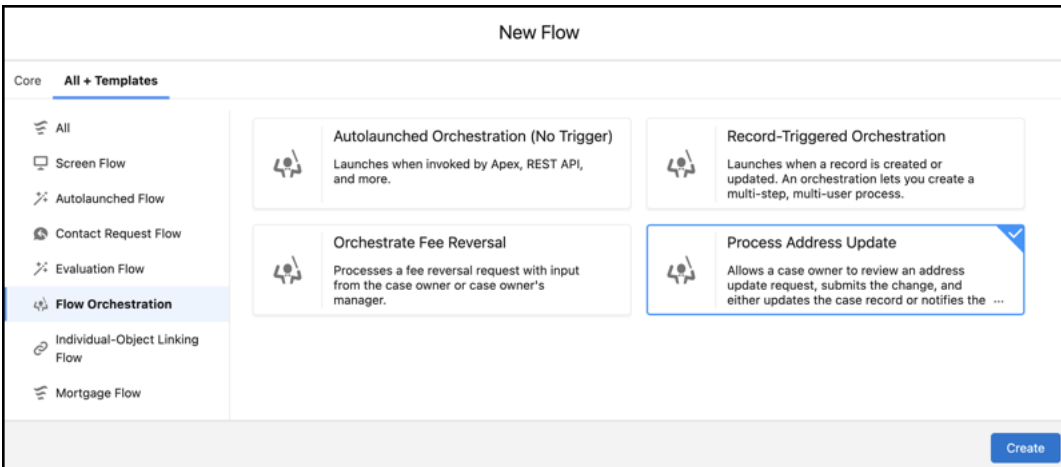
5. Click **Save**.

   a. Enter an Orchestration Label and Description.

   b. Enter the Orchestration API Name: *fsc_address_update_flow*.

   c. Click **Save**.

6. Assign a case owner.

   a. On the fsc_address_update_flow orchestration screen, under **Process Address Update**, select **Verify the Updated Address with the documents uploaded**.

   b. Under **Select Someone to Complete the Action**, for **Asignee Type**, select **User**, and for **User Resource**, select a user who has the necessary permissions to complete the flow.

      You can also assign the step to a queue whose members have the necessary permissions to complete the flow. For **Asignee Type**, select **Queue**, and for **Queue**, select an appropriate queue.

   c. Save your changes.

   d. Under **Post-Update Actions**, select **Update Case Status or Display Error** and assign a user or a queue who has the necessary permissions to complete the flow.

   e. Save your changes.

7. On the fsc_address_update_flow orchestration screen, select **Attempt Address Update**. Then click **Open Flow in Flow Builder**.
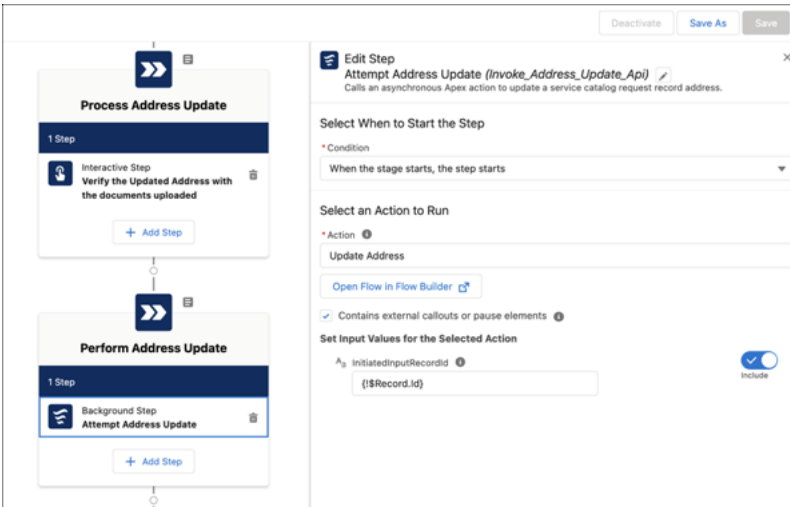
a. In the Toolbox, click the Manager tab.

b. In the Variables section, click **IntegrationDefinition**.

c. Update the default value to match the Integration Definition Developer name from Create an Integration Definition.
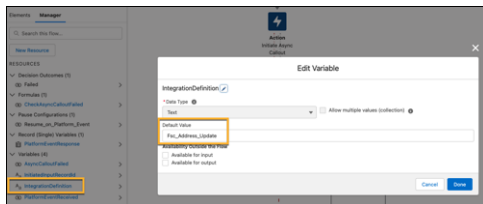
d. Click **Done**.

e. Click **Save As** and enter a unique name Flow Label and Flow API Label.

f. Click **Activate**.

8. On the fsc_address_update_flow orchestration screen, refresh the page.

9. Select **Update Address** flow.

a. In Select a Flow, update the flow to run when the steps start in the flow you created 6 - e.

b. Select **Contains external callouts or pause elements**.

c. Enter `{!$Record.ID}` in the **InitiatedinputRecordID** field.

d. Save your changes.

10. Save and activate the FSC Address Update Flow orchestration.

SEE ALSO:

Salesforce Help: Flow Builder

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Complete the steps in Add the Case Details Lightning Component to the Case Record Page.

2. Next, Create an Address Update Service Process.

Create an Address Update Service Process

USER PERMISSIONS		EDITIONS
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	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

Create a unique version of the Address Update service process and enter the details.

1. In Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Click **New Service Process** and then click **Create from Template**.

3. Select **Address Update** and click **Save & Launch**.
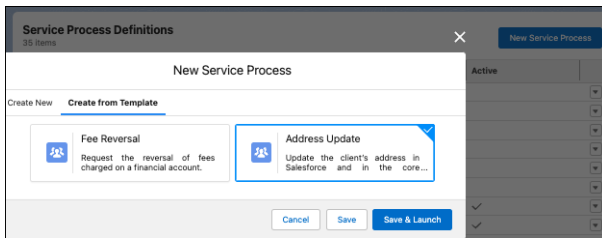
4. Enter a process name and unique API name.

🛑 Important: Make a note of the API Name. Use it to update the Address Update OmniScript, FlexCard, and Decision Matrix.

5. Update the short and long description.

6. Save your changes.

Add Data Attributes

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
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	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Optionally, create data attributes to store information from a client. The Address Update service process has predefined data attributes. You can create more as needed to meet the needs of your business.

1. In Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Edit an existing service process or create one.

3. Select **Data Attributes** and then click **New Data Attribute**.

.

4. Enter an Attribute Name and API Name.

5. Select an **Attribute Type**.

6. Select a **Data Type**.

7. Optionally, select a Parent Attribute.

8. Optionally, enter a Default Value and Description.

9. Optionally, select **Required**.

10. Click **Add**.

11. Save your changes.

Update the Address Update Salesforce Flow for Service Catalog Requests

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

To trigger the Address Update Salesforce flow only for updates in response to Service Catalog Requests, connect the SvcCatalogItemDefinitionID field to your Address Update service process. Update the Start element in the cloned Address Update Salesforce flow and add your Address Update service process API name. When a case is created, a Service Catalog Request is created.

📝 **Note:** Configure your OmniStudio permissions for users.

1. In Setup, in the Quick Find box, enter `Flow`, and then click **Flow**.

2. Click the cloned Address Update flow orchestration.

3. Click the **Record-Triggered Orchestration** Start element, then click **Edit**.

    a. For Condition Requirements, select **All Conditions Are Met (AND)**.

    b. For Field, select **SvcCatalogItemDefinitionId**.

    c. For Operator, select **Equals**.

    d. For Value, enter the value of your Service Process Definition ID from the Create an Address Update Service Process topic.
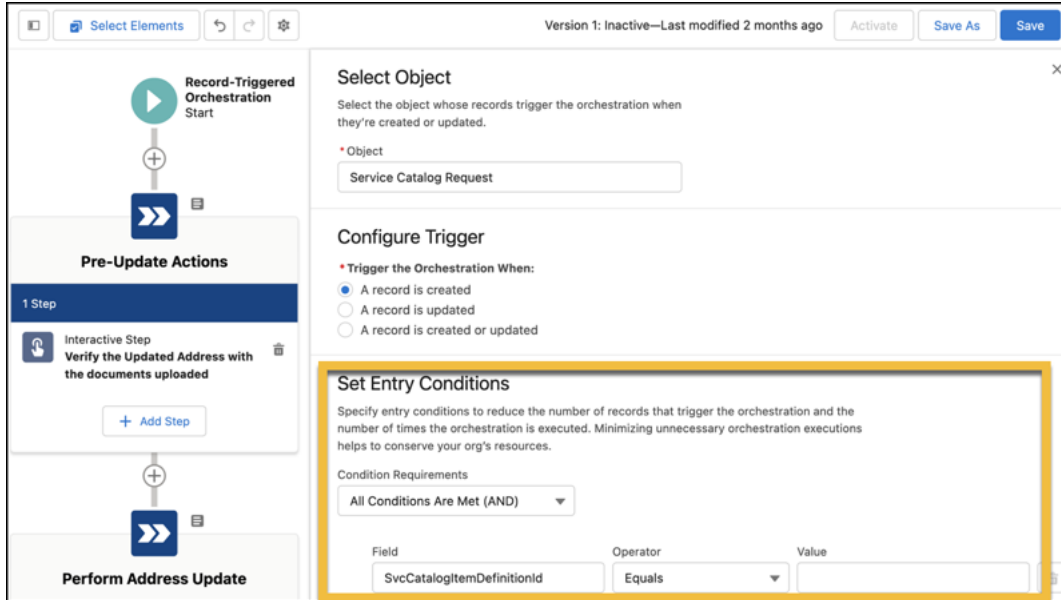
4. Save and activate the Address Update Flow Orchestration.

Update the Address Update OmniScript

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Update the name of the Service Process in the cloned version of the FSCAddressUpdate/CreateRequest OmniScript to your Service Process Definition API Name.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.

- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

3. Select **FSCAddressUpdate/CreateRequest** OmniScript.

4. Click **Deactivate**.
   You can make changes only when an OmniScript is deactivated.

5. Click **CallConnectAPI - Integration Procedures Action**.

   a. In the pane, expand **Remote Properties**.

   b. In Extra Payload, update the svcCatalogItemDefApiName value to your Service Process Definition API Name from the Create an Address Update Service Process.
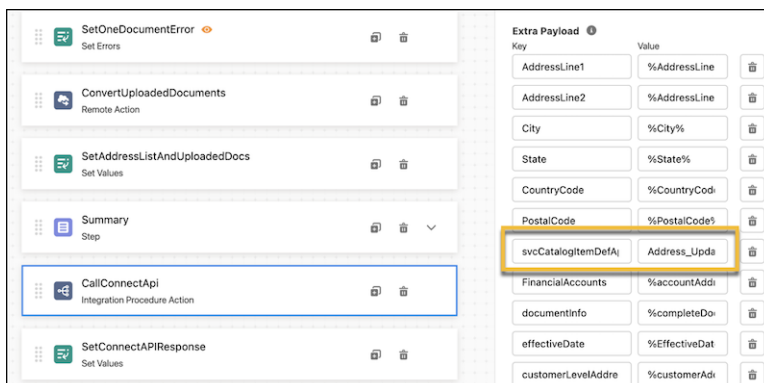
6. Click **GetAllDocuemntTypesIP Integration Procedure Action**.

   a. In the pane, expand **Remote Properties**.

   b. In Extra Payload, update the ProcessName value to your Service Process Definition API Name from the Create an Address Update Service Process.
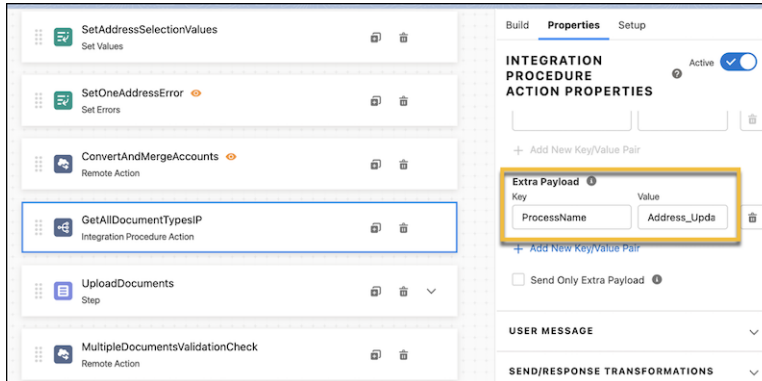
7. To save your changes, click **Activate Version**.

Create Document Types

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Set up document types that let your users select a supporting documentation type that confirms the client's new address.

1. Turn on Document Checklist.

    a. In Setup, in the Quick Find box, enter `Document Checklist`, then click **Document Checklist**.

    b. Turn on **Checklist Items with Attachments**.

2. Create document types.

    a. In Setup, in the Quick Find box, enter `Document Type`, then click **Document Type**.

    b. Click **New Document Type**.

    c. Enter a Label, Name, Description, and click **Save**.

    d. To add more document types, repeat these steps as needed.

SEE ALSO:

Salesforce Help: Set Up Document Types

Create a Decision Matrix Set

To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Create a decision matrix and add your address update service process name and document types. The Address Update Service process uses the Business Rules Engine to create rules using decision matrices and expression sets to show a list of valid document types that a user can select. Document types are a list of supporting documentation that a user can request from a client to validate the client's new address.

A decision matrix matches the input values to a table row and returns the row's output values. The GetAllDocuemntTypesIP Integration Procedure in the FSCAddressUpdate/CreateRequest OmniScript reads the table values. It shows users as picklist values in the Document Type field on the FSCCaseDetailsServiceCatalogRequest FlexCard on the Person Account record page.

1. From the App Launcher, find and select **Business Rules Engine**.

2. In the OmniStudio app, from the navigation bar, select **Lookup Tables**.

3. Click **New**.

4. Click **Decision Matrix**, and then click **Next**.

5. Enter the Name `GetAllRequiredDocumentTypes`. For Type, select **Standard**. Then click **Save**.

6. Click the **Related** tab.

7. In the Decision Matrix Versions, click the name of the decision matrix.

8. Click **Add Column**.

   a. In the Column Header enter `ProcessName`.

   b. For Header Type, select **Input**.

   c. For Data Type select **Text**.

   d. Click **Done**.

9. Click **Add Column**.

   a. In the Column Header enter `DocumentTypes`.

   b. For Header Type select **Output**.

   c. For Data Type, select **Text**.

   d. Click **Done**.

10. Click **Add Row**.

11. Click the edit icon in the ProcessName box.

    a. Enter the value of your Service Process Definition API Name from the Create an Address Update service process. Press Enter to confirm the name.

12. Click the edit icon in the DocumentTypes box.

    a. In a comma-separated list, enter the document types you created in Create Document Types. Press Enter to confirm the list.
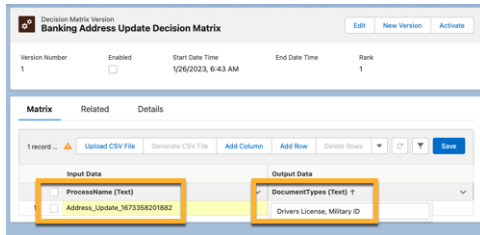
13. Click **Save**.

14. To activate the decision matrix, click **Activate**.

SEE ALSO:

    Salesforce Help: Decision Matrices

Create an Expression Set

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Create an expression set to read the values in the decision matrix and populate the values in the document type.

1. From the App Launcher, find and select **Business Rules Engine**.
2. In the OmniStudio app, from the navigation bar, select **Expression Sets**.
3. Click **New**.
4. Enter Name GetAllDocumentTypes and select Usage Type Default.
5. Click **Save**.

New Expression Set

Information

* Name   Owner Name
GetAllDocumentTypes   Admin User

* Usage Type
Default

Cancel   Save & New   Save

6. In the Expression Set Versions, click the version name.
7. To add the decision matrix, click **Open in Expression Set Builder**.
   a. Click **Elements** icon.
   b. Drag the **Lookup Table** element onto the expression set canvas.
   c. In the Search Lookup Table box, select *GetAllRequiredDocumentType*.
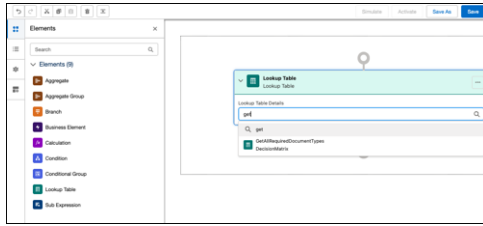
8. Set the properties for the expression set.

   a. Click the cog icon.

   b. Enter a start date time and an end date time for the expression set.

   c. Enter a rank number.

9. Set the element details for the expression set.

   a. Click the element details icon.

   b. Select **Include in Output**.

10. Save and activate the expression set.

SEE ALSO:

   Salesforce Help: Expression Sets

Create Address Update Action

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Create an action launcher deployment that uses the service process template to give your users quick access to the Address Update OmniScript. If you have an existing action launcher deployment, add the Address Update OmniScript to it.

1. In Setup, in the Quick Find box, enter `Action Launcher`, then click **Action Launcher**.
   If you can't see Action Launcher, you need the Industries Service Excellence permission set. Contact your Salesforce Admin for help.

2. Click **New Deployment**.

3. Click **Next**.

4. Enter a Label and API Name.

5. In Guidance to Show, select **Flows and Quick Actions** and **OmniScripts**.

6. Click **Next**.

7. In the Available Objects list, select **Account** and move it to the Selected Objects list.
   The selected objects determine the objects where you can show the action.

8. Click **Next**.

9. In Select actions to add, select all the actions.

10. Click **Next**.

11. In Select frequently used actions, select Action API Name **/FSCAddressUpdate/CreateRequest/English** Omniscript.
The OmniScript must be activated to see it in the list.

If you created a unique OmniScript with a different name, select your customized OmniScript.

12. Click **Save**.

SEE ALSO:

Salesforce Help: Action Launcher

Customize the Page Layouts With Source System ID

USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine	
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete	
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All	
	AND	

Financial Services Cloud Extension

OR

Financial Services Cloud Basic

OR

Financial Services Cloud Standard

Add the Source System ID field to the Financial Account and Account page layouts. This field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

The Financial Services Cloud managed package must be installed in Salesforce before you can complete these steps.

1. Update the page layouts.

   a. In Setup click **Object Manager**.

   b. In the search box, enter `Financial Account` and select **Financial Account (Banking) Layout**.

   c. Click **Page Layouts**.

   d. In the Quick Find box, enter `Source System ID`.

   e. Drag the Source System ID field to the Information pane.
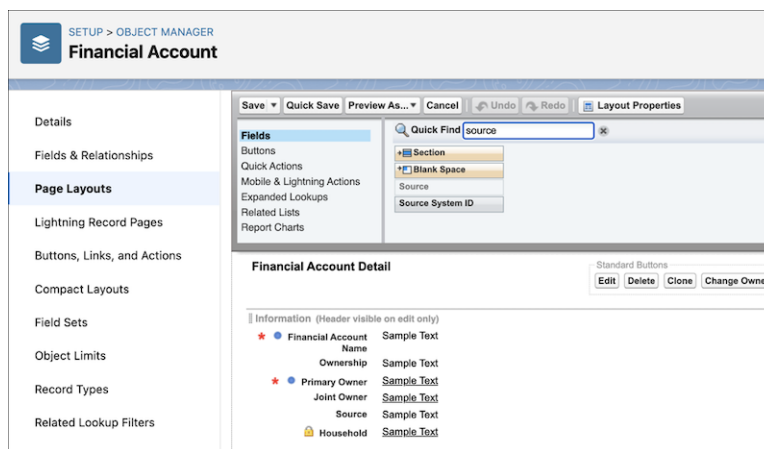
   f. Save your changes.

   g. Complete steps b through f for other Account and Financial Account page layouts.

2. Update the Source System ID field.

   a. From the App Launcher, select **Retail Banking Console**.

   b. From the Retail Banking Console app menu, click **Financial Accounts**.

   c. Select a Financial Account.

   d. Update the Source System ID field with your core banking system ID.

   e. Complete steps b through d for other Account and Financial Account page layouts.

Add the Address Update Action to the Person Account Page

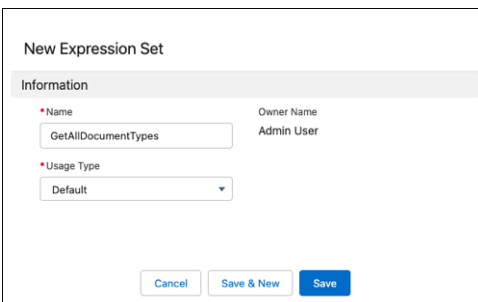| USER PERMISSIONS		EDITIONS
To set up Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, Business Rules Engine	Available in: Lightning Experience
	Case, Service Catalog Request, and Document Checklist Items objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects Read, Create, Edit, Delete, View All	
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	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To give your users quick access to the Address Update OmniScript, add the Address Update action launcher component to the person account page layout.

1. In Setup, click **Object Manager**.

2. In the Quick Find box, enter `Account`, and then click **Account**.

3. Click **Lightning Record Pages** and select **Account Record Page**.

4. Click **Edit**.

5. In the Components tab, add the **Actions Launcher** to the record page.

6. In the properties pane, in the Action Launcher Deployment, select the action launcher deployment name that you created in step 4 of Create Address Update Action.

7. Save your changes.

Activate the Address Update Service Process

To use Address Update service process:	Industries Service Process, Industry Service Excellence, OmniStudio, Document Checklist, and Business Rules Engine
	Case, Service Catalog Request, and Document Checklist Items objects: Read, Create, Edit, Delete
	Decision Matrix, Decision Matrix Columns, Decision Matrix Rows, Decision Matrix Versions, Expression Set, Expression Set Object Aliases, Expression Set Step Relationships, Expression Set Versions objects: Read, View All
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Confirm the OmniScript, Integration Definition, and Salesforce Flow and activate the Address Update service process.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. In Setup, in the Quick Find box, enter *Service Process Studio*, and then click **Service Process Studio**.

2. Click **Update** for the service process you created in the *Create an Address Update Service Process* topic.

3. Click **Request Form** and confirm the OmniScript.

4. Click **Integration Definition** and confirm the Integration Definition.

5. Click **Fulfillment Flow** and confirm the Salesforce Flow.

6. Click **Activate**.

Configure the Address Update OmniScript

To customize the address update request flow, edit the steps of the Change Address OmniScript.

Update Address

To edit the address update flow, open the OmniStudio app, go to the OmniScripts page, expand the FSCAddressUpdate/CreateRequest OmniScript, and open the latest version.

Component Name	Component Type	What It Does	What It Calls
SetAccountContext	Integration Procedure	Retrieves the customer community user's Account Id from Salesforce when the user logs in to a self-service portal and launches the address update service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	sFservice_SetAccountContext Integration Procedure

Component Name	Component Type	What It Does	What It Calls
		To let customer community users use the address update service process on a self-service portal, the SetAccountContext component must be present in the FSCAddressUpdate/CreateRequest OmniScript.	
GetAccountAddresses	DataRaptor Extract	Retrieves the user's existing addresses.	FSCAddressUpdateAccountDetails DataRaptor
NewAddressInformation	Step	Prompts for the user for new address information.	None
SetAddressValidation	Set Values	Checks to see if the customer already has an account and an address in the system.	None
ConvertAddresses	Remote Action	Reformats the retrieved addresses.	AddressUpdateHelperFunctions class, convertAddresses method
ConvertAccounts	Remote Action	Reformats the Financial Account data.	AddressUpdateHelperFunctions class, convertArrayToKeyValuePairs method
UpdateRecords	Step	Displays the user's old addresses and prompts for which one to update.	FSCDisplayCustomerAddressUpdate_1_Salfore and FSCDisplayFinancialAccountAddressUpdate_1_Salfore LWCs
SetAddressList	Set Values	Sets values based on the selected addresses.	None
SetAddressSelectionValues	Set Values	Checks to make sure that at least one address is selected.	None
SetOneAddressError	Set Errors	Displays an error message if no address is selected.	None
ConvertAndMergeAccounts	Remote Action	Merges the new address data into the Financial Account data.	AddressUpdateHelperFunctions class, convertAndMergeAccounts method
GetAllDocumentTypesIP	Integration Procedure	Retrieves the document types list.	FSCAddressUpdate_GetDocumentTypes Integration Procedure
UploadDocuments	Step	Prompts for address change documents.	None
MultipleDocumentsValidationCheck	Remote Action	Checks to see if multiple documents are uploaded.	AddressUpdateHelperFunctions class, ifUploadContainsMultipleFiles method
SetOneDocumentError	Set Errors	Displays an error message if two documents of the same type are uploaded.	None
ConvertUploadedDocuments	Remote Action	Processes the uploaded documents.	AddressUpdateHelperFunctions class,

Component Name	Component Type	What It Does	What It Calls
			convertUploadedDocuments method
SetAddressListAndUploadedDocs	Set Values	Sets values based on the uploaded documents.	Note
Summary	Step	Displays the address change, lists the uploaded documents, and presents a Submit button for the user to confirm the address change.	FSCDisplayCustomerAddresses_1_Salesforce, FSCDisplayAccountLevelAddresses_1_Salesforce, and FSCDisplayUploadedFileNames_1_Salesforce LWCs
CallConnectApi	Integration Procedure	Creates a case for the address change.	FSCAddressUpdate_CreateCase Integration Procedure
SetConnectAPIResponse	Set Values	Sets values based on the case.	None
AddressChangeFinal	Step	Displays the address change again along with a case number.	FSCDisplayCaseConfirmationIcon_1_Salesforce LWC

Required OmniScript Components

Check that the required components are in place in Salesforce to support Address Update Service Process. The Address Update OmniScript calls the following Integration Procedures, DataRaptors, FlexCards, LWCs (Lightning Web Components), and Apex classes.

Integration Procedures

- FSCAddressUpdate_GetDocumentTypes
- FSCAddressUpdate_CreateCase

DataRaptors

- FSCAddressUpdateAccountDetails (Extract)

FlexCards and LWC

- FSCDisplayCustomerAddressestoUpdate_1_Salesforce
- FSCDisplayFinancialAccountsAddressestoUpdate_1_Salesforce
- FSCDisplayCustomerAddresses_1_Salesforce
- FSCDisplayAccountLevelAddresses_1_Salesforce
- FSCDisplayUploadedFileNames_1_Salesforce
- FSCDisplayCaseConfirmationIcon_1_Salesforce

Expression Sets

- GetAllDocumentTypes

Apex Classes

- The AddressUpdateHelperFunctions.Apex class handles some of the complex business logic behind the OmniScript.

SEE ALSO:

AddressUpdateHelperFunctions Class

Request an Address Update for a Client

Submit a request to complete an address update change for a client using the Address Update service process.

When a client asks to update their address, use the Address Update service process to update the client's address in Salesforce and in the core banking system.

Complete the Address Update Request Form

Complete the Address Update request form.

Take Action on an Address Update Request Case

Review the address update request case. Approve, decline, or request additional information for the address update.

Complete the Address Update Request Form

Complete the Address Update request form.

1. From the Retail Banking App, select **Accounts** from the dropdown menu.

2. On the Accounts tab, search for and select the Account name.

3. Click the **Address Update** quick action.

4. Complete the Address Change form with the client's new address and click Next.

5. Select the records to update with the new address and click **Next**.
   The client can choose to update the address on Accounts and Financial Accounts records.

6. Select a Document Type and click **Upload Files** to select a copy of the supporting documentation with the new address. Then click **Next**.
   To validate the client's identity, the client must provide a copy of the valid document type that contains the new address.

7. Review the address change details and click **Submit**.
   The address change request is successfully submitted. A case is created and assigned to a manager for approval.

Take Action on an Address Update Request Case

Review the address update request case. Approve, decline, or request additional information for the address update.

1. From the Retail Banking App, select **Accounts** from the dropdown menu.

2. On the Case tab, search for and select an Address Update Service Request case.

3. Click the **Service Request** tab.

4. Review the new address and selected records to update with the new address.

5. Click the **Related** tab.

6. In the Document Checklist Items related list, review the document type and uploaded file.

7. In Work Guide, click the actions menu on the document file and click **Approve** to verify the document.

8. To approve the address update request, click **Next**.

Fee Reversal Service Process

The Fee Reversal service process allows your customers to request a reversal of fees charged to their accounts.

Reverse Fees on Client Accounts Using Service Process Studio

Use the Service Process Studio to customize the Fee Reversal service process to meet the needs of your business. The guided flow lets you customize the default Fee Reversal service process to give your users a process to submit a request to complete a fee reversal.

Reverse a Fee for a Client

Submit a request to complete a fee reversal for a client using the Fee Reversal service process.

Reverse Fees on Client Accounts Using Service Process Studio

Use the Service Process Studio to customize the Fee Reversal service process to meet the needs of your business. The guided flow lets you customize the default Fee Reversal service process to give your users a process to submit a request to complete a fee reversal.

📝 **Note:** The Financial Services Cloud managed package must be installed in Salesforce before you can complete these steps.

Assign Permissions to Users

To configure the Fee Reversal service process, assign permissions.

Connect to MuleSoft and Create a Named Credential

Turn on Financial Services Cloud Integrations and create a MuleSoft named credential to connect your external banking system to Salesforce.

Create Integration Definitions

The Fee Reversal service process uses two integration definitions, fee_reversal_integration_definition and FSC_GetTransaction.

Clone and Activate the OmniScript

Clone and activate the FSC/FeeReversal OmniScript. The OmniScript gives your users a guided path for completing the address update request intake process of the address update service process. Use the OmniScript as it is, or customize it to meet the needs of your business. Create and add a custom label to customize the name that shows in the action launcher.

Clone and Activate the Fee Reversal Salesforce Flow

Use the Fee Reversal Salesforce Flow Orchestration to show your users step-by-step instructions to submit a fee reversal for a client. You can customize the flow to meet your business needs.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Create a Fee Reversal Service Process

Create a unique version of the Fee Reversal service process and enter the details.

Add Data Attributes

Optionally, create data attributes to store information from a client. The Fee Reversal service process has predefined data attributes. You can create more as needed to meet the needs of your business.

Update the Fee Reversal Salesforce Flow

To connect the SvcCatalogItemDefinitionID field to your Fee Reversal service process, update the start element in the cloned Fee Reversal Salesforce Flow. When a case is created, a Service Catalog Request is created. Adding your Fee Reversal service process API name triggers the flow only for fee reversal based on the Service Catalog Requests.

Update the Fee Reversal OmniScript

Update the name of the Service Process in the cloned version of the FSC/FeeReversal OmniScript to your Service Process Definition API Name.

Create Fee Reversal Action

To give your users quick access to the Fee Reversal OmniScript, create an action launcher deployment that uses the service process template. If you have an existing action launcher deployment, add the Fee Reversal OmniScript to it.

Add the Action to the Person Account Page

Add the Fee Reversal action launcher component to the Person Account page layout to give your users quick access to the Fee Reversal OmniScript. Create and add a custom label to customize the name that shows in the action launcher.

Activate the Fee Reversal Service Process

Confirm the OmniScript, Integration Definition, and Salesforce Flow and activate the Fee Reversal service process.

Configure the Fee Reversal OmniScript

To customize the fee reversal request flow, edit the steps of the Fee Reversal OmniScript. Open the OmniStudio app, go to the OmniScripts page, expand the FSC/FeeReversal OmniScript, and open the highest version.

Required OmniScript Components

Check that the required components are in place in Salesforce to support the Fee Reversal service process.

SEE ALSO:

Salesforce Help: Service Process Studio

Assign Permissions to Users

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	

AND

Financial Services Cloud Extension

OR

Financial Services Cloud Basic

OR

Financial Services Cloud Standard

To configure the Fee Reversal service process, assign permissions.

📝 **Note:** Configure your OmniStudio permissions for users.

1. Assign permission set licenses.

   a. In Setup, in the Quick Find box, enter `Users`, then click **Users**.

   b. Click a user.

   c. In Permission Set License Assignments, click **Edit Assignments**.

   d. Select **Industry Service Process**, **Industry Service Excellence**, and **OmniStudio**, and **Financial Services Cloud Extension**, or **Financial Services Cloud Basic**, or **Financial Services Cloud Standard**.

   e. Save your changes.
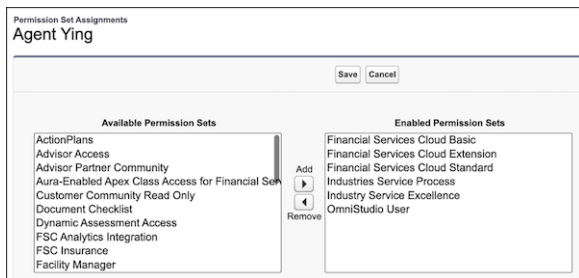
2. Update field level security.

   a. In Setup, in the Quick Find box, enter `Profiles`, then click **Profiles**.

   b. Click a profile.

   c. In Field-Level Security, click **View** for the Case object.

   d. Click **Edit**.

   e. Select **Read Access** and **Edit Access** for Account Name.

   f. Save your changes.
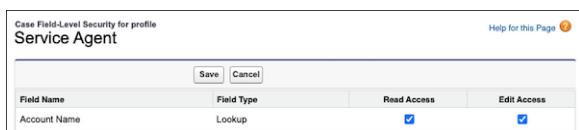
g. Similarly, update the field-level security for the **Case Source** field on the Case object. For the profiles using the Fee Reversal Service Process, select **Visible** and deselect **Read-Only**.

3. Update object permissions.

   a. In Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

   b. Click **Edit** for a profile.

   c. In Standard Object Permissions, select **Read**, **Create**, and **Edit** for Case object.

   d. Save your changes.

   e. Complete these steps for Service Catalog Requests, Service Catalog Item Dependencies, and Service Catalog Request Related Items objects.

SEE ALSO:

   Salesforce Help: Setup OmniStudio Standard User Permission Sets

Connect to MuleSoft and Create a Named Credential

Turn on Financial Services Cloud Integrations and create a MuleSoft named credential to connect your external banking system to Salesforce.

1. In Setup, in the Quick Find box, enter `Integrations Setup`, and then select **Integrations Setup**.

2. In Financial Services Cloud Integrations, click **I accept the terms and conditions**.

3. Turn on **Financial Services Cloud Integrations**.

4. Click **Connect to MuleSoft Instance**.

5. Select a service and click **Next**.

6. Enter your MuleSoft username and password and click **Sign In**.

7. Click **Grant Access to <your username>**. It takes a few minutes for Salesforce to connect to MuleSoft.

8. Locate the API to connect to and click **Enable**.

9. In Setup, in the Quick Find box, enter `Named Credential`, and then select **Named Credential**.

10. Verify that a named credential, FSC_fsc_integrations_V1_0_0, was added for the connected MuleSoft instance.

Create Integration Definitions

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

The Fee Reversal service process uses two integration definitions, fee_reversal_integration_definition and FSC_GetTransaction.

The fee_reversal_integration_defintion integration definition stores these two values:

- Named credential: The external endpoint where fee reversal API is implemented (example MuleSoft).
- Apex provider: It handles the logic of calling the endpoint and updating the SvcCatalogReqExtdAttrVal records for the Fee Reversal response attributes with the API response.

The FSC_GetTransaction integration definition calls the API to get the Financial Account Transactions from the MuleSoft endpoint where the external banking systems have been deployed.

1. In Setup, in the Quick Find box, enter `Integrations Definitions`, and then select **Integrations Definitions**.

2. Click **+ New**.

3. Create an Integration Definition with these settings:

   a. For Type, select **Apex Defined**.

   b. For Name and Developer Name, enter `fee_reversal_integration_definition`.

   c. Click **Next**.

   d. For Apex Class, select **fscserviceprocess.FeeReversalProcessIntegrationProvider**.

   e. Value `FSC_fsc_integrations_V1_0_0`. Save the definition and then click **Activate**.

4. Create a second Integration Definition with these settings:

   a. For Type, select **Apex Defined**.

   b. For Name and Developer Name, enter `FSC_GetTransaction`.

   c. Click **Next**.

   d. For Apex Class, select **fscserviceprocesses.TransactionServiceIntegrationProvider**.

    e. Save the definition and click **Activate**.

Clone and Activate the OmniScript

To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Clone and activate the FSC/FeeReversal OmniScript. The OmniScript gives your users a guided path for completing the address update request intake process of the address update service process. Use the OmniScript as it is, or customize it to meet the needs of your business. Create and add a custom label to customize the name that shows in the action launcher.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.
   It can take a little time for the OmniScripts app to show.

3. Select **FSC/FeeReversal**.

4. Create **New Version**.

5. Click **Activate Version**.

SEE ALSO:

Salesforce Help: Custom Labels

Clone and Activate the Fee Reversal Salesforce Flow

<table>
<tr><td>USER PERMISSIONS</td><td></td><td>EDITIONS</td></tr>
<tr>
<td>To set up Fee Reversal service process:</td>
<td>Industries Service Process, Industry Service Excellence, and OmniStudio

Case and Service Catalog Request objects Read, Create, Edit, Delete, View All

AND

Financial Services Cloud Extension

OR

Financial Services Cloud Basic

OR

Financial Services Cloud Standard</td>
<td>Available in: Lightning Experience

Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled</td>
</tr>
<tr>
<td>To use Fee Reversal service process:</td>
<td>Industries Service Process, Industry Service Excellence, and OmniStudio

Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete

AND

Financial Services Cloud Extension

OR

Financial Services Cloud Basic

OR

Financial Services Cloud Standard</td>
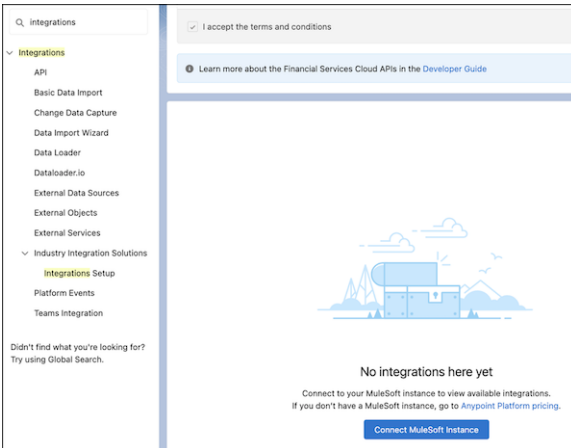<td></td>
</tr>
</table>

Use the Fee Reversal Salesforce Flow Orchestration to show your users step-by-step instructions to submit a fee reversal for a client. You can customize the flow to meet your business needs.

Clone the Fee Orchestrate template and activate a new version in Salesforce. The orchestration provides a declarative process automation that contains a sequence of stages and steps. A stage contains interactive and background steps. Interactive steps have an assigned user and execute a designated screen flow. Background steps execute an autolaunched flow that's executed by the system and requires no user interaction. The interactive and background steps are required to fulfill the request to reverse a fee.

The Fee Reversal Flow Orchestrator allows users to process a fee reversal request with input from the case owner or a manager:

- Review Fee Reversal: Allows a case owner or manager to review and override transaction details for the fee reversal request associated with the service catalog request ID passed into the flow. The case owner reviews the transaction details and reversal percentage for the fee reversal request. The case owner can either submit the reversal request for processing or escalate to their manager, for example, if the customer requests a higher reversal percentage. When escalated, manager can override the fee reversal percentage.

- Attempt Fee Reversal: Calls an asynchronous action to process a fee reversal request in the core banking system through an API call to MuleSoft.
- Confirm Fee Reversal: Closes the case passed into the flow when a previous call to the Industries Apex Asynchronous Request action is successful and displays a success or failure message to the flow user.
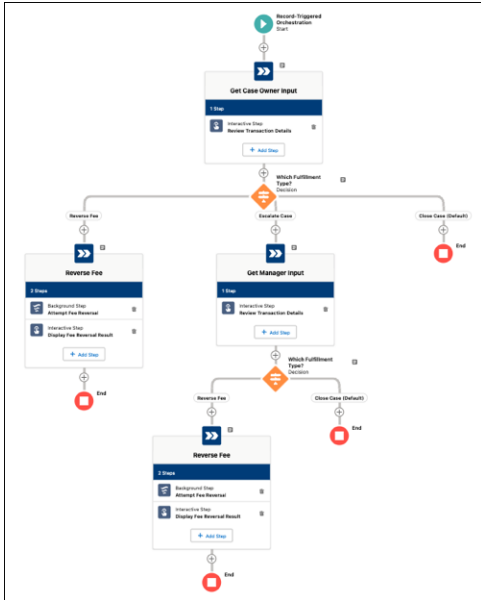
1. In Setup, in the Quick Find box, enter `Flow`, and then click **Flow**.

2. Click **New Flow**.

3. Click **All + Templates** and select **Flow Orchestration**.

4. Select **Orchestrate Fee Reversal** and click **Create**.
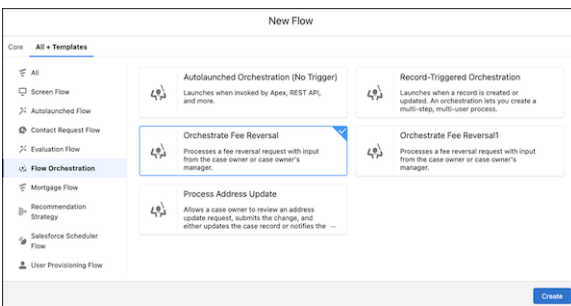
5. Click **Save**.

   a. Enter an Orchestration Label and Description.

   b. Enter the Orchestration API Name: `fsc_fee_reversal_flow`.

   c. Click **Save**.

6. Assign a case owner.

    a. On the fsc_fee_reversal_flow orchestration screen, under **Get Case Owner Input**, select **Review Transaction Details**.

    b. Under **Select Someone to Complete the Action**, for **Asignee Type**, select **User**, and for **User Resource**, select a user who has the necessary permissions to complete the flow.

        You can also assign the step to a queue whose members have the necessary permissions to complete the flow. For **Asignee Type**, select **Queue**, and for **Queue**, select an appropriate queue.

    c. Save your changes.

    d. Under **Get Manager Input**, select **Review Transaction Details** and assign a user or a queue who has the necessary permissions to complete the flow.

    e. Save your changes.

    f. Under **Reverse Fee**, select **Display Fee Reversal Result** and assign a user or a queue who has the necessary permissions to complete the flow.

    g. Save your changes.

7. Save and activate the Fee Reversal Flow Orchestration.

SEE ALSO:

   Salesforce Help: Flow Builder

   Salesforce Help: Customize What Happens When a Flow Fails

Add the Case Details Lightning Component to the Case Record Page

USER PERMISSIONS			EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio		Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All		Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND		
	Financial Services Cloud Extension		
	OR		
	Financial Services Cloud Basic		
	OR		
	Financial Services Cloud Standard		

To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Complete the steps in Add the Case Details Lightning Component to the Case Record Page.

2. Next, Create a Fee Reversal Service Process.

Create a Fee Reversal Service Process

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

Create a unique version of the Fee Reversal service process and enter the details.

1. In Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Click **New Service Process** and then click **Create from Template**.

3. Select **Fee Reversal** and click **Save & Launch**.
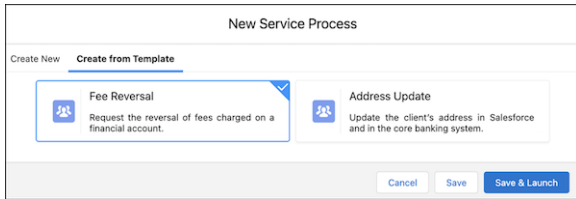
4. Enter a process name and unique API name.

   🛑 **Important:** Make a note of the API Name. Use it to update the Fee Reversal OmniScript and FlexCard.

5. Update the short and long description.

6. Save your changes.

Add Data Attributes

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Optionally, create data attributes to store information from a client. The Fee Reversal service process has predefined data attributes. You can create more as needed to meet the needs of your business.

1. In Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Edit an existing service process or create one.

3. Select **Data Attributes** and then click **New Data Attribute**.

4. Enter an Attribute Name and API Name.

5. Select an **Attribute Type**.

6. Select a **Data Type**.

7. Optionally, select a Parent Attribute.

8. Optionally, enter a Default Value and Description.

9. Optionally, select **Required**.

New Data Attribute

*Attribute Name   *API Name

*Attribute Type ⓘ

○ Extended   ○ Base

*Data Type   Parent Attribute ⓘ

Select data type... ▾   --None-- ▾

Default Value

Description

Cancel   Add

10. Click **Add**.

11. Save your changes.

Update the Fee Reversal Salesforce Flow

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
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	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
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	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To connect the SvcCatalogItemDefinitionID field to your Fee Reversal service process, update the start element in the cloned Fee Reversal Salesforce Flow. When a case is created, a Service Catalog Request is created. Adding your Fee Reversal service process API name triggers the flow only for fee reversal based on the Service Catalog Requests.

📝 **Note:** Configure your OmniStudio permissions for users.

1. In Setup, in the Quick Find box, enter `Flow`, and then click **Flow**.

2. Click the cloned Fee Reversal flow orchestration.

3. Click the **Record-Triggered Orchestration** Start element, then click **Edit**.

   a. In Condition Requirements, select **All Conditions Are Met (AND)**.

   b. In Field, select **SvcCatalogItemDefinitionId**.

   c. In Operator, select **Equals**.

   d. In Value, enter the value of your Service Process Definition ID from the Create a Fee Reversal Service Process topic.

4. Save and activate the Fee Reversal Flow Orchestration.

Update the Fee Reversal OmniScript

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
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	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Update the name of the Service Process in the cloned version of the FSC/FeeReversal OmniScript to your Service Process Definition API Name.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

3. Select **FSC/FeeReversal** OmniScript.

4. Click **Deactivate**.
   You can make changes only when an OmniScript is deactivated.

5. Click **CreateCase - Integration Procedures Action**.

   a. In the pane, expand **Remote Properties**.

   b. In Extra Payload, update the svcCatalogItemDefApiName value to your Service Process Definition API Name from the Create a Fee Reversal Service Process topic.
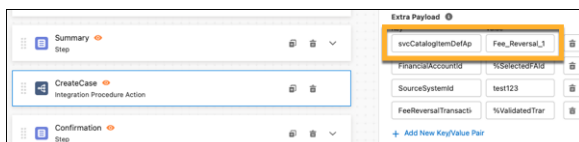
6. Click **Activate Version** to save your changes.

Create Fee Reversal Action

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
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	OR	
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To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
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	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

To give your users quick access to the Fee Reversal OmniScript, create an action launcher deployment that uses the service process template. If you have an existing action launcher deployment, add the Fee Reversal OmniScript to it.

1. In Setup, in the Quick Find box, enter `Action Launcher`, then click **Action Launcher**.
   If you can't see Action Launcher, you need the Industries Service Excellence permission set. Contact your Salesforce Admin for help.

2. Click **New Deployment** or edit an existing deployment.

3. Click **Next**.

4. Enter a Label and API Name.

5. In Guidance to Show, select **Flows and Quick Actions** and **OmniScripts**.

6. Click **Next**.

7. In the Available Objects list, select **Account** and move it to the Selected Objects list.
The selected objects determine the objects where you can show the action.

8. Click **Next**.

9. In Select actions to add, select all the actions.

10. Click **Next**.

11. In Select frequently used actions, select Action API Name **/FSC/FeeReversal/English** Omniscript.
The OmniScript must be active to see it in the list.

If you created a unique OmniScript with a different name, select your customized OmniScript.

12. Click **Save**.

SEE ALSO:

Salesforce Help: Action Launcher

Add the Action to the Person Account Page

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
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	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

Add the Fee Reversal action launcher component to the Person Account page layout to give your users quick access to the Fee Reversal OmniScript. Create and add a custom label to customize the name that shows in the action launcher.

1. In Setup, click **Object Manager**.

2. In the Quick Find box, enter *Account*, and then click **Account**.

3. Click **Lightning Record Pages** and select **Account Record Page**.

4. Click **Edit**.

5. In the Components tab, add the **Actions Launcher** to the record page.

6. In the properties pane, in the Action Launcher Deployment, select the action launcher deployment name that you created in the Create Address Update Action topic.
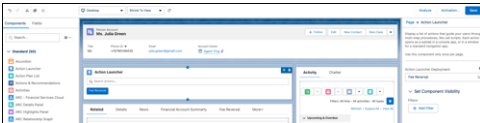
7. Save your changes.

SEE ALSO:

   Salesforce Help: Custom Labels

Activate the Fee Reversal Service Process

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
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	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	

OR

Financial Services Cloud Standard

Confirm the OmniScript, Integration Definition, and Salesforce Flow and activate the Fee Reversal service process.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. In Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Click **Update** for the Service Process you created in the Create a Fee Reversal service process topic.

3. Click **Request Form** and confirm the OmniScript.

4. Click **Integration Definition** and confirm the Integration Definition.

5. Click **Fulfillment Flow** and confirm the Salesforce Flow.

6. Click **Activate**.

Configure the Fee Reversal OmniScript

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
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	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
	AND	
	Financial Services Cloud Extension	
	OR	
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	OR	
	Financial Services Cloud Standard	

To customize the fee reversal request flow, edit the steps of the Fee Reversal OmniScript. Open the OmniStudio app, go to the OmniScripts page, expand the FSC/FeeReversal OmniScript, and open the highest version.

To customize the fee reversal request flow, edit the steps of the FSC/FeeReversal OmniScript. Open the OmniStudio app, go to the OmniScripts page, expand the FSC/FeeReversal OmniScript, and open the highest version.

Component Name	Component Type	What It Does	What It Calls
SetAccountContext	Integration Procedure	Retrieves the customer community user's Account Id from Salesforce when the user logs in to a self-service portal and launches the fee reversal service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable. To let your customer community users use the fee reversal service process on a self-service portal, the SetAccountContext component must be present in the FSC/FeeReversal OmniScript.	SelfService_SetAccountContext Integration Procedure
GetFinancialAccounts	Integration Procedure	Retrieves Financial Accounts associated with a Person Account.	FSC_GetFeeReversalFinancialAccounts Integration Procedure, which calls three DataRaptors: FSCFeeReversalGetFinancialAccounts, FSCFeeReversalFilterFinancialAccounts, and FSCFeeReversalTransformFinancialAccounts
SelectFinancialAccount	Step	Displays a selectable list of accounts.	FSCFeeReversalFinancialAccounts FlexCard
SetSelectedFinancialAccount	Set Values	Assembles information about the selected account.	None
GetFeeReversalTransactions	Integration Procedure	Retrieves fee transactions for the selected account.	FSC_GetFeeReversalTransactions Integration Procedure
SelectFeeType	Step	Prompts for the fee type dropdown list.	None
SetSelectedFeeType	Set Values	Assembles information about the selected Fee type.	None
FSCFeeReversalFilterTransactions	DataRaptor Transform	Filter Transactions based on selected Fee type.	FSCFeeReversalFilterTransactions DataRaptor
SelectTransactions	Step	Displays a selectable list of fees of that type.	FSCFeeReversalTransactions FlexCard, which has a child FlexCard: FSCFeeReversalTransactionDataTable
SetSelectedTransactions	Set Values	Assembles information about the selected fee.	None

Component Name	Component Type	What It Does	What It Calls
ValidateFeeReversalTransactions	Integration Procedure	Verifies that reversal of the selected fee isn't explicitly prohibited.	FSC_ValidateFeeReversalTransactions Integration Procedure, which calls the FSCFeeReversalTransactionAge DataRaptor
Summary	Step	Displays summary information about the fee reversal request.	FSCFeeReversalSummary FlexCard
CreateCase	Integration Procedure	Creates a case for the fee reversal request and returns the case number.	FSC_FeeReversalCreateCase Integration Procedure, which calls the FeeReversalHelperFunctions class and callCreateCaseApi method
Confirmation	Step	Displays the case number.	None

Required OmniScript Components

Check that the required components are in place in Salesforce to support the Fee Reversal service process.

The FeeReversal OmniScript calls the following Integration Procedures, DataRaptors, FlexCards, LWCs (Lightning Web Components), and Apex methods.

Integration Procedures:

- FSC_GetFeeReversalTransactions
- FSC_ValidateFeeReversalTransactions
- FSC_FeeReversalCreateCase
- FSC_GetFeeReversalFinancialAccounts

DataRaptors:

- FSCFeeReversalGetFinancialAccounts (Extract)
- FSCFeeReversalTransactionAge (Transform)
- FSCFeeReversalFilterFinancialAccounts (Transform)
- FSCFeeReversalTransformFinancialAccounts (Transform)
- FSCFeeReversalFilterTransactions (Transform)

FlexCards and Lightning Web Components:

- FSCFeeReversalTransactions (FlexCard)
- FSCFeeReversalFinancialAccounts (FlexCard)
- FSCFeeReversalSummary (FlexCard)
- FSCFeeReversalTransactionDataTable (FlexCard)

Apex Classes:

The FeeReversalHelperFunctions Apex class handles some of the complex business logic behind the OmniScript.

Reverse a Fee for a Client

Submit a request to complete a fee reversal for a client using the Fee Reversal service process.

When a client asks to reverse a fee on their financial account, you can use the Fee Reversal service process to quickly submit a fee reversal case for review. A manager reviews the fee reversal case details, then selects a fulfillment type and request reason to reverse the fee, escalate the case, or close the case.

Submit a Fee Reversal Request

Use the fee reversal process to reverse fees on client financial accounts.

Review and Complete a Fee Reversal Request

Review a request to reverse a fee on a client's account. To complete the request, select a fulfillment type and reversal reason.

Submit a Fee Reversal Request

USER PERMISSIONS

To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete
	AND
	Financial Services Cloud Extension
	OR
	Financial Services Cloud Basic
	OR
	Financial Services Cloud Standard

Use the fee reversal process to reverse fees on client financial accounts.

1. On the Person Account record page for the client, in the action launcher, click **FSCFeeReversal**.

2. Select a financial account, then click **Next**.

Only the financial accounts where client is a primary owner or joint owner are shown. You can select only one financial account per fee reversal request. Only checking, saving, and credit card type financial accounts are shown.

3. To view a list of transactions, select a fee type, then click **Next**.

The available fee types depend on your company.
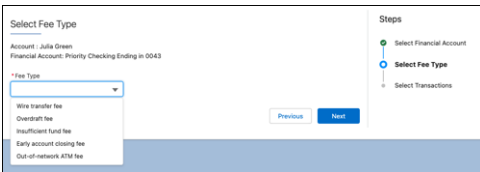
4. Select a transaction, then click **Next**.

The available transactions depend on the company's validation rules.

- ID: The core banking system ID.
- Type: The fee type of the transaction.
- Code: The code of the transaction.
- Posted Date: The posted date and time of the original transaction.
- Description: The description of the original transaction.
- Amount: The original transaction amount that was charged to the customer.
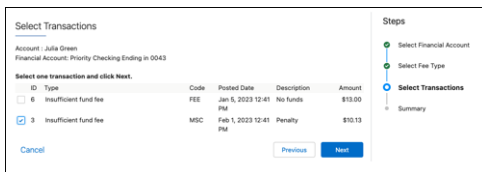
5. Review the fee reversal summary.

a. Transactions with status non-reversible are removed from the fee reversal request.

The Reason field provides details when a transaction isn't eligible for reversal. It's blank if the transaction is reversible.

b. Click **Create a Case**.
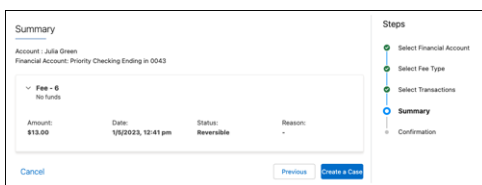
6. Review the fee reversal summary.

   a. Click the case number to review the case associated with the fee reversal.

Review and Complete a Fee Reversal Request

USER PERMISSIONS		EDITIONS
To set up Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	Available in: Lightning Experience
	Case and Service Catalog Request objects Read, Create, Edit, Delete, View All	Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	
To use Fee Reversal service process:	Industries Service Process, Industry Service Excellence, and OmniStudio	
	Case, and Service Catalog Request Items objects: Read, Create, Edit, Delete	
	AND	
	Financial Services Cloud Extension	
	OR	
	Financial Services Cloud Basic	
	OR	
	Financial Services Cloud Standard	

Review a request to reverse a fee on a client's account. To complete the request, select a fulfillment type and reversal reason.

1. On the Cases list view, select the case number for a new fee reversal service request.
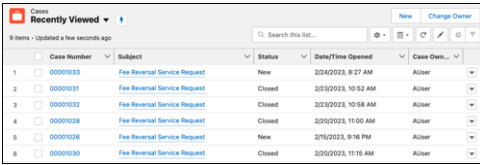
2. Review and select a fulfillment type for the fee reversal service request.

   a. Click the **Service Request** tab.

   b. Review the service request details.

   c. Select a Fulfillment Type.

   - Reverse Fee: Reverse the fee and close the case.
   - Escalate Case: Escalate the case to a manager.
   - Close Case: Close the case without reversing the fee.

   d. Select a Reversal Reason.

   e. Click **Next**

.
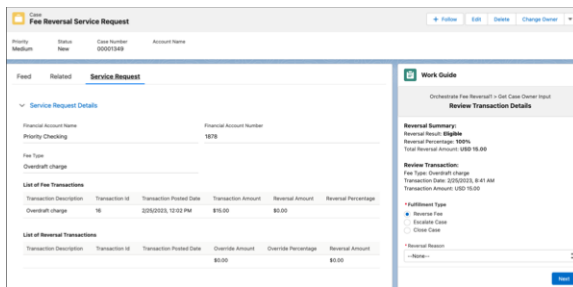
Fee Reversal Service Request Screen

Field Label	Description
Financial Account Name	The name of the financial account.
Financial Account Number	ID that uniquely identifies the financial account in an external data source.
Fee Type	The fee type of the transaction.
Transaction Description	The description of the original transaction.
Transaction ID	The ID of the original transaction.
Transaction Posted Date	The posted date and time of the original transaction.
Transaction Amount	The original transaction amount that was charged to the customer.
Reversal Amount	The amount that is eligible to be reversed.

Field Label	Description
Reversal Percentage	The percentage of the original amount that is eligible to be reversed.
Override Amount	The overridden reversal amount.
Override Percentage	The percentage of the original amount that is overridden.
Reversal Result	The result of the fee reversal.
Total Reversal Result	The amount that is reversed.
Fulfillment Type	The next step for the fee reversal request.
Reversal Reason	The reason to reverse the fee.

Transaction Dispute Management

Transaction Dispute Management provides a streamlined process for your users to capture and submit customer disputes related to financial transactions. Use Service Process Studio to quickly configure the Transaction Dispute Management service process to give your users a guided step-by-step process for capturing customer disputes. Let your users launch the dispute intake request directly from a customer's record page in Salesforce.

Set Up Transaction Dispute Management

With Transaction Dispute Management, service agents can effortlessly and accurately capture customer disputes regarding their financial transactions with a guided intake form.

Submit a Transaction Dispute Request

Your service agents can capture and submit a transaction dispute request through the dispute intake OmniScript. A case is then created in Salesforce.

Set Up Transaction Dispute Management

With Transaction Dispute Management, service agents can effortlessly and accurately capture customer disputes regarding their financial transactions with a guided intake form.

Configure the Dispute Object

To associate the financial account of a customer with a dispute request, add a field to the Dispute object.

Assign Transaction Dispute Management Permissions to User

To use the dispute intake process, assign relevant permissions to your users.

Connect to MuleSoft and Enable Integration

To get financial transactions from a core banking system in the dispute intake form, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Create an Integration Definition

Transaction Dispute Management uses fscserviceprocess.TransactionServiceIntegrationProvider integration definition. It calls the API to get the client's financial transactions from the core banking system.

Customize the Page Layouts with Source System ID

Add the Source System ID field to the Financial Account and Account page layouts. This field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Add the Picklist Values Required for a Dispute Request

To indicate the type, subtype, and status of a dispute request, activate the picklist values.

Add Related Lists to the Page Layout

When a dispute request is submitted, case, dispute, dispute items, document checklist items, and assessment records are created. To track and monitor disputes, add these records as related lists to the page layouts.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Create a Transaction Dispute Service Process Definition with the Default Template

Create a unique version of the Transaction Dispute service process and enter the details.

Add Assessment Questions in the Dispute Intake OmniScript

Help your agents collect accurate data and additional details from customers regarding their disputed financial transactions through a pre-built discovery framework sample questionnaire. The sample questionnaire contains assessment questions and an OmniScript that can be embedded into the FSC/TransactionDisputeManagement OmniScript.

Update the Dispute Intake OmniScript

Update the name of the Service Process in the cloned version of the FSC/TransactionDisputeManagement OmniScript to your Service Process Definition API Name.

Transaction Enrichment

Facilitate the resolution of transaction disputes by enhancing the details of financial transactions through transaction enrichment. Enrichment provides additional information related to a transaction, such as merchant name, logo, and URL. By showing additional information during dispute intake, you can help your customers recall the details about the transactions they're disputing. If the enrichment providers publish an API, you can set up transaction enrichment in Transaction Dispute Management through dispute intake OmniScript, business rules, and integration with any enrichment provider.

Configure Dispute Intake without Transaction Enrichment

Transaction Enrichment is an optional feature in Transaction Dispute Management. If you don't want to enrich the financial transactions with merchant information, deactivate the enrichment-related components in the dispute intake OmniScript.

Enable Merchant Alerts for Disputed Transactions

Transaction Dispute Management integrates with Ethoca Merchant Alerts™ to notify merchants about disputed transactions through alerts. With this integration, you can communicate with the merchants involved in disputed transactions and reduce the likelihood of chargebacks. The alert statuses and outcomes are stored in Salesforce. Your dispute processing team can use the alert status and outcome to monitor the dispute resolution workflow and facilitate faster dispute resolutions.

Enable User Access to User External Credentials Object

User external credential objects store encrypted tokens used by named credentials. You must enable user external credentials to use named credentials.

Set Up Deflection for Disputed Transactions

Transaction deflection helps you redirect the disputed transactions based on predefined business rules and criteria. The deflection feature in Transaction Dispute Management gives you the flexibility of defining certain thresholds for transactions using an expression set. During a dispute request intake, when transactions don't satisfy the thresholds, they can be resolved without requiring further investigations.

Associate the Dispute Intake OmniScript to an Action Launcher Deployment

The FSC/TransactionDisputeManagement OmniScript guides users in capturing a customer dispute request. Agents can launch this Omniscript from the record details page of a person account to capture a dispute request.

Activate the Transaction Dispute Service Process

Associate the dispute intake OmniScript and the integration definition with the service process definition and activate the transaction dispute service process.

Dispute Intake OmniScript Components

You can customize the dispute intake OmniScript to suit your business needs.

Configure the Dispute Object

To associate the financial account of a customer with a dispute request, add a field to the Dispute object.

1. In Setup, go to **Object Manager**.

2. In the Quick Find box, enter `Dispute`, and then select **Dispute**.

3. In Fields & Relationships, click **New**.

4. For the field type, select **Lookup Relationship** and click **Next**.

5. From the Related To dropdown menu, select **Financial Account** and click **Next**.

6. For Field Label, enter `Financial Account` and for Field Name, enter `FinancialAccount`.

7. Click **Next**.

8. Save your changes.

Assign Transaction Dispute Management Permissions to User

To use the dispute intake process, assign relevant permissions to your users.

1. Assign permission sets.

    a. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.

    b. Click a user's name.

    c. In Permission Set Assignments, click **Edit Assignments**.

    d. From Available Permission Sets, select and add OmniStudio User, Financial Services Cloud Standard or Financial Services Cloud Extension permission set.

    e. Save your changes.

2. Update field-level security.

    a. In Setup, go to **Object Manager**.

    b. Locate each of the objects listed in this task and click **Fields & Relationships**.

    c. For each object and field, update the field-level security as shown in this table for all the profiles that use Transaction Dispute Management.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Case Source	For the profiles using Transaction Dispute Management, select **Visible** and deselect **Read-Only**.
	Account Name	
Dispute	Account	For the profiles using Transaction Dispute Management, select **Visible** and deselect **Read-Only**.
	Actual Amount	
	Approved Amount	
	Assessment	
	Card Cancellation Requested	
	Card Reissue Requested	
	Case	
	Description	
	Dispute Subtype	
	Dispute Type	
	Disputed Amount	
	Financial Account	
	Received Date	
	Status	
DisputeItem	Approved Provisional Credit	For the profiles using Transaction Dispute

OBJECT	FIELD	FIELD-LEVEL SECURITY
	Card Last Four Digit	Management, select **Visible** and deselect **Read-Only**.
	Card Six Digit BIN	
	Dispute	
	Disputed Amount	
	Enrichment Provider	
	Fund Flow Direction	
	Merchant Address	
	Merchant Category	
	Merchant Description	
	Merchant Logo URL	
	Merchant Name	
	Merchant URL	
	Provisional Credit Approver	
	Provisional Credit Date	
	Provisional Credit Status	
	Status	
	Transaction Amount	
	Transaction Code	
	Transaction Currency Code	
	Transaction Date	
	Transaction Description	
	Transaction ID	
	Validation Outcome	
	Validation Outcome Reason	
DisputeItemMerchantAlert	Alert Delivery Status	For the profiles using Transaction Dispute Management, select **Visible** and deselect **Read-Only**.
	Alert Delivery Status Description	
	Alert Identifier	
	Dispute Item	
	Disputed Transactions Batch Identifier	
	Disputed Transactions Batch Status	

OBJECT	FIELD	FIELD-LEVEL SECURITY
	Outcome	
	Outcome Description	
	Outcome Update Date Time	
	Refund Status	
	Source	
	Type	

3. Assign object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate these objects and assign the Read, Create, Edit, and View All permissions.

OBJECT
Cases
Disputes
Dispute Items
Dispute Item Merchant Alerts
Service Catalog Requests
Service Catalog Item Dependencies
Service Catalog Request Related Items
Document Checklist Items
Assessments
Assessment Questions
Assessment Question Responses

   d. Save your changes.

   e. Repeat these steps for other profiles that are relevant for dispute intake or fulfillment.

Connect to MuleSoft and Enable Integration

To get financial transactions from a core banking system in the dispute intake form, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Before you connect to MuleSoft and enable integration, turn on the setting to retrieve real-time financial account and transaction information from your external core banking system. When this setting is off, account information is retrieved from Salesforce. For more information, see Enable Real-Time Financial Account Information.

1. Connect your Salesforce and MuleSoft instances.

   a. From Setup, in the Quick Find box, enter *Integrations Setup*, and then select **Integrations Setup**.

   b. In Financial Services Cloud Integrations, click **I accept the terms and conditions**.

   c. Turn on **Financial Services Cloud Integrations**.

   d. Click **Connect to MuleSoft Instance**.

   e. Select a service and click **Next**.

   f. Enter your MuleSoft username and password and sign in.

   g. Grant access to your MuleSoft account.

      It takes a few minutes for Salesforce to connect to MuleSoft.

      Your Salesforce and MuleSoft instances are now connected. You can view connection details and available integrations.

2. Enable Integration between Salesforce and the core banking system.

   a. On the Integrations Setup page, in the Available Integrations area, from the list of available integrations, go to the integration to enable, and then click **Enable**.

   b. Select a business group for which you want to enable the integration.

   c. Select the environment where you want to enable the integration.

   d. Enter the app name.

      Ensure that the app name is unique for your MuleSoft instance.

   e. Click **Next**.

   f. To connect to the core banking system, select the authentication protocol for the integration and its dependent apps, and then enter the relevant details.

   g. Enable the integration and wait for the process to complete.
      A named credential is created for the enabled integration.

   h. From Setup, in the Quick Find box, enter *Named Credential*, and then select **Named Credential**.

   i. Verify that a named credential was added for the connected MuleSoft instance.

   j. From the quick actions menu of the named credential, select **Edit**.

   k. For Label, enter *FSC_fsc_integrations_V1_0_0*.

l. Save your changes.

Create an Integration Definition

Transaction Dispute Management uses fscserviceprocess.TransactionServiceIntegrationProvider integration definition. It calls the API to get the client's financial transactions from the core banking system.

Before you connect to MuleSoft and enable integration, turn on the setting to retrieve real-time financial account and transaction information from your external core banking system. When this setting is off, account information is retrieved from Salesforce. For more information, see Enable Real-Time Financial Account Information.

1. From Setup, in the Quick Find box, enter `Integrations Definitions`, and then select **Integrations Definitions**.

2. Click **+ New**.

3. Create an Integration Definition with these settings.

    a. For Type, select **Apex Defined**.

    b. For Name and Developer name, enter `FSC_GetTransaction`.

    c. Click **Next**.

    d. Search for and select the **fscserviceprocess.TransactionServiceIntegrationProvider** Apex class.

    e. Confirm that the Attribute Value is **FSC_fsc_integrations_V1_0_0**.

        The Attribute Name and Attribute Value fields are auto-populated. To point to a different named credential, enter an attribute name and attribute value.

    f. Save and activate the definition.

Customize the Page Layouts with Source System ID

Add the Source System ID field to the Financial Account and Account page layouts. This field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

The Financial Services Cloud managed package must be installed in Salesforce before you can complete these steps.

1. Update the page layouts.

   a. In Setup, go to **Object Manager**.

   b. In the Quick Find box, enter `Financial Account`, then select **Financial Account**.

   c. In Page Layouts, click **Financial Account (Banking) Layout**.

   d. In the Quick Find box, enter `Source System ID`.

   e. Drag the Source System ID field to the Information pane.

   f. Save your changes.

   g. Complete steps b through f for other Account and Financial Account page layouts.

2. Update the Source System ID field.

   a. From the App Launcher, find and select **Retail Banking**.

   b. From the Retail Banking app menu, click **Financial Accounts**.

   c. Update the Source System ID field for the financial accounts with your core banking system ID.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

> **USER PERMISSIONS**
>
> To create and edit page layouts:
> • Customize Application

Add the Picklist Values Required for a Dispute Request

To indicate the type, subtype, and status of a dispute request, activate the picklist values.

1. In Setup, go to **Object Manager**.

2. Locate each of the objects listed in this task and click **Fields & Relationships**.

3. For each object and field, add these picklist values.

Object	Field	Picklist Value
Case	Status	In Review
		Submitted
		Resolved

Object	Field	Picklist Value
Dispute	DisputeType	Fraud
		Processing Error
		Consumer Dispute

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>
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>
> To activate the picklist values:
> • Customize Application

Object	Field	Picklist Value
Dispute	DisputeSubtype	Undelivered Product or Service
		Failed Transaction
		Refund Not Processed
		Products or Services Not as Described
		Defective Product
		Charged Multiple Times
		Outstanding Charge on Original Payment Method
		Overcharged
		Account Debited but No Cash Dispensed by ATM
		Fraudulent Transaction
		Disclosed OTP, Card, or Account Details
		Lost or Stolen Card

Object	Field	Picklist Value
Dispute Item	Status	Submitted
		Invalid
		Resolved
		No longer disputed

Object	Field	Picklist Value
Dispute Item	Validation Outcome	Automatic write-off
		Eligible
		Invalid

Object	Field	Picklist Value
Dispute Item	Fund Flow Direction	INFLOW
		OUTFLOW

Object	Field	Picklist Value
Dispute Item Merchant Alert	Type	Confirmed Fraud
		Consumer Dispute

Object	Field	Picklist Value
Dispute Item Merchant Alert	Refund Status	Yes
		No
		Not Settled

Object	Field	Picklist Value
Dispute Item Merchant Alert	Outcome	Resolved
		Previously Refunded
		Unresolved
		Not Found
		Other

Object	Field	Picklist Value
Dispute Item Merchant Alert	Disputed Transactions Batch Status	IN PROGRESS
		PROCESSED

Object	Field	Picklist Value
Dispute Item Merchant Alert	Alert Delivery Status	Delivered
		Undelivered
		Failed
		Ignored
		Updated

Add Related Lists to the Page Layout

When a dispute request is submitted, case, dispute, dispute items, document checklist items, and assessment records are created. To track and monitor disputes, add these records as related lists to the page layouts.

1. In Setup, go to **Object Manager**.

2. Select the **Case** object.

3. In Page Layouts, click **Case Layout**.

4. From the Case Layout menu, select **Related Lists**.

5. Drag **Disputes**, **Assessments**, and **Document Checklist Items** to the related lists section of the page.

6. Save your changes.

7. Similarly, in the page layout for the Dispute object, add **Dispute Items** to the related lists section.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

SEE ALSO:

[Add the Case Details Lightning Component to the Case Record Page](#)

Create a Transaction Dispute Service Process Definition with the Default Template

Create a unique version of the Transaction Dispute service process and enter the details.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then click **Service Process Studio**.

2. Click **New Service Process** and then click **Create from Template**.

3. Select **Transaction Dispute** and click **Save & Launch**.

4. Enter a process name and unique API name.

    Make a note of the API Name. Use it to update the dispute intake OmniScript.

5. Under Data Attributes, in the Financial Information section, create a new base-type data attribute with these details.

    a. For Attribute Name, enter `financial account id`.

    b. For API Name, enter `financial_account_id`.

    c. For Attribute Type, select **Base**.

    d. For Base Object, select **Dispute**.

    e. For Field Identifier, select **Financial Account**.

    f. Click **Add**.

6. Save your changes.

Add Assessment Questions in the Dispute Intake OmniScript

Help your agents collect accurate data and additional details from customers regarding their disputed financial transactions through a pre-built discovery framework sample questionnaire. The sample questionnaire contains assessment questions and an OmniScript that can be embedded into the FSC/TransactionDisputeManagement OmniScript.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. Deploy the Discovery Framework Sample Template for Transaction Dispute Management.

   a. From Setup, in the Quick Find box, enter `Discovery Framework`, and then under Discovery Framework, select **General Settings**.

   b. Enable **Discovery Framework**, **Import or Export**, and **Sample Templates**.

   c. From Setup, in the Quick Find box, enter `Discovery Framework Sample Templates`, and then select **Discovery Framework Sample Templates**.

   d. To see a list of the assessment questions, OmniScripts, DataRaptors, and Integration Procedures that are included in the template, next to **FSC_DM**, click **View Details**.

   e. Deploy the **FSC_DM** template.

      Wait for the deployment process to complete.

2. Embed the FSC/DisputeDetails OmniScript in the FSC/TransactionDisputeManagement OmniScript.

   a. From the App Launcher, find and select **OmniStudio**.

   b. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

      It can take a little time for the OmniScripts app to open.

   c. Select **FSC/DisputeDetails** and open the highest version of the OmniScript.

   d. Click **Setup**, and ensure the **Reusable** checkbox is selected.

   e. Activate the OmniScript.

   f. Navigate to the **FSC/TransactionDisputeManagement** OmniScript and open the highest version.

   g. Create a clone of the OmniScript.

   h. In the cloned version, locate the **Provide Additional Details** step.
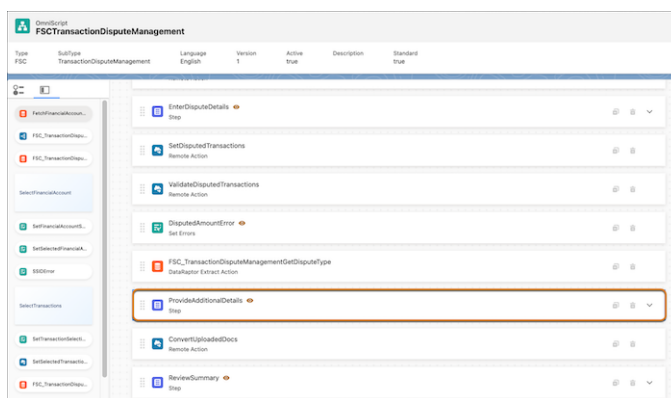
i. In the OmniScript's Build panel, expand the **OmniScripts** section.
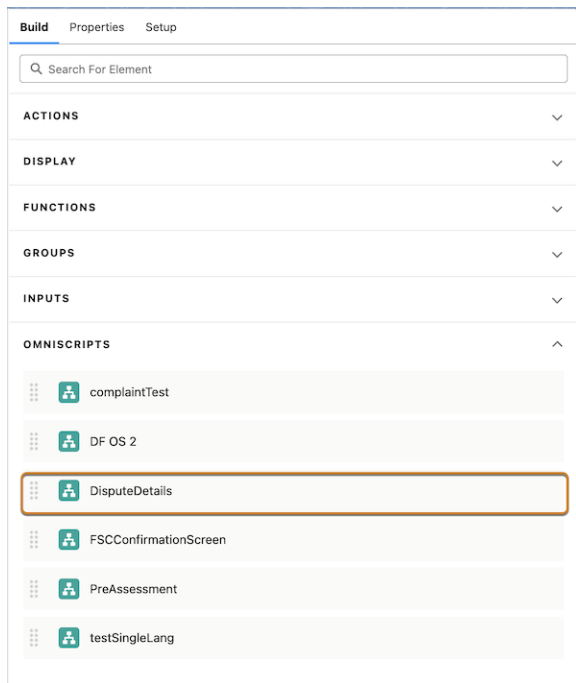
j. Drag the **DisputeDetails** OmniScript to the canvas above the **Provide Additional Details** step.

k. Remove the **Provide Additional Details** step from the OmniScript.

l. To test the OmniScript behavior, preview your OmniScript.

Update the Dispute Intake OmniScript

Update the name of the Service Process in the cloned version of the FSC/TransactionDisputeManagement OmniScript to your Service Process Definition API Name.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.

- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

3. Select the **FSC/TransactionDisputeManagement** OmniScript and open the highest version.

4. If the OmniScript is active, deactivate it to make any changes.

5. Click **CallConnectApiFromApex** Remote Action.

    a. Under Properties, expand **Remote Properties**.

    b. In Extra Payload, update the svcCatalogItemDefApiName value to your Service Process Definition API Name.

6. Activate the OmniScript.

Transaction Enrichment

Facilitate the resolution of transaction disputes by enhancing the details of financial transactions through transaction enrichment. Enrichment provides additional information related to a transaction, such as merchant name, logo, and URL. By showing additional information during dispute intake, you can help your customers recall the details about the transactions they're disputing. If the enrichment providers publish an API, you can set up transaction enrichment in Transaction Dispute Management through dispute intake OmniScript, business rules, and integration with any enrichment provider.

Set Up Transaction Enrichment with Ethoca Consumer Clarity™

Transaction Dispute Management integrates with Ethoca Consumer Clarity™ to enrich transactions with merchant-related details.

Define a Decision Matrix and Set Up an Expression Set

Use the Business Rules Engine to automate the decision-making process when identifying the transaction enrichment providers. Use a decision matrix to define the specific types of transactions eligible for enrichment and an expression set to determine the corresponding enrichment provider.

Set Up Transaction Enrichment with Ethoca Consumer Clarity™

Transaction Dispute Management integrates with Ethoca Consumer Clarity™ to enrich transactions with merchant-related details.

Configure the Endpoint for Ethoca Consumer Clarity™

Create external credentials and named credentials with details of how Salesforce authenticates to these enrichment providers.

Create an Integration Definition for Ethoca Consumer Clarity™

Transaction Dispute Management uses an integration definition to specify the details of how Salesforce communicates with the Ethoca Consumer Clarity™ transaction enrichment provider. The integration definition calls the API to get the merchant-related information for transactions in the dispute intake OmniScript.

Update the Integration Procedure with the Integration Definition Name

Add the developer name of the integration definition you created for the enrichment service provider in the FSCTransactionDisputeManagement/ThirdPartyEthocaEnrichment integration procedure.

Configure the Endpoint for Ethoca Consumer Clarity™

Create external credentials and named credentials with details of how Salesforce authenticates to these enrichment providers.

Before you begin, ensure that you enabled user access to the User External Credentials object. See Enable User Access to User External Credentials Object.

1. To specify the URL of the Ethoca Consumer Clarity enrichment provider endpoint, create a custom authentication external credential.

   a. From Setup, in the Quick Find box, enter `Named Credentials`, and then select **Named Credentials**.

   b. To create an external credential, go to External Credentials and then click **New**.

   c. Enter a label and a name for the external credential.

   d. From the Authentication Protocol dropdown list, select **Custom**.

   e. Save your changes.

   f. To create a named credential to reference the external credential you created, go to Named Credentials and then click **New**.

   g. Enter a label and a name for the named credential.

      Make a note of the named credential name. Use it to update the integration definition.

   h. In the URL field, enter the URL of the callout endpoint.

   i. From the External Credential dropdown list, select the external credential that you created.

   j. Save your changes.

      You're taken to the Named Credentials screen.

2. Create a principal for the custom authentication external credential.

   After you've created an external credential that uses custom authentication, create a principal for it. You can then map this principal to profiles of users who need access.

   a. On the Named Credentials page, go to **External Credentials**.

   b. Select the custom external credential you created.

   c. Scroll to the Principals section.

   d. To create a principal for this external credential, click **New**.

   e. Enter a parameter name and a sequence number.

   f. From the Identity Type dropdown list, select **Named Principal**.

   g. Enter a username and a password.

   h. Save your changes.

3. Enable the external credential principal for users.

   To make callouts to the external Ethoca enrichment provider, give profiles access to the principal of the external credential that you created. For more information, see Enable External Credential Principals.

4. Store the private keys of Ethoca Consumer Clarity as a certificate in Salesforce.

   The consumer key and the private keys establish a secure connection between Salesforce and the external enrichment provider.

   a. Convert the P12 keystore containing the private keys of Consumer Clarity into a Salesforce-compatible JavaKeystore (JKS) format using this command.

```
keytool -importkeystore -srckeystore [MY_FILE.p12] -srcstoretype pkcs12 -srcalias
[ALIAS_SRC] -destkeystore [MY_KEYSTORE.jks] -deststoretype jks -deststorepass
[PASSWORD_JKS] -destalias [ALIAS_DEST]
```

For more information, see Generate a salesforce compatible JKS from PFX or P12.

b. From Setup, in the Quick Find box, enter `Certificate`, and then select **Certificate and Key Management**.

c. Click **Import from Keystore**.

d. Upload the keystore file that you converted.

e. Enter the keystore password.

f. Save your changes.

SEE ALSO:

Create and Edit a Custom Authentication External Credential

Certificates and Keys

Create an Integration Definition for Ethoca Consumer Clarity™

Transaction Dispute Management uses an integration definition to specify the details of how Salesforce communicates with the Ethoca Consumer Clarity™ transaction enrichment provider. The integration definition calls the API to get the merchant-related information for transactions in the dispute intake OmniScript.

Before you begin, ensure that you created the needed named credentials and external credentials. See Configure the Endpoint for Ethoca Consumer Clarity™.

1. From Setup, in the Quick Find box, enter `Integrations Definitions`, and then select **Integrations Definitions**.

2. Click **+ New**.

3. For Type, select **Apex Defined**.

4. Enter a name and a developer name for the integration definition.

5. Enter a name and a developer name for the integration definition.

Make a note of the developer name of the integration definition. Use it to update the FSCTransactionDisputeManagement/ThirdPartyEthocaEnrichment Integration Procedure.

6. Click **Next**.

7. Search for and select **ThirdPartyConsumerClarityEnrchIntegPrvd** Apex class.

8. For the Enrichment Provider Named Credential attribute value, enter the name of the named credential that you created for Consumer Clarity.

9. For the Get Ethoca Consumer Key attribute value, enter the consumer key that you obtained from Consumer Clarity for enrichment.

10. For the Get Ethoca Secret Certificate Name attribute value, enter the name of the certificate containing the private keys of Consumer Clarity that you uploaded to Salesforce.

11. Save and activate the integration definition.

Update the Integration Procedure with the Integration Definition Name

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EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To create Apex-defined integration definitions:
- Customize Application

Add the developer name of the integration definition you created for the enrichment service provider in the FSCTransactionDisputeManagement/ThirdPartyEthocaEnrichment integration procedure.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **Integration Procedures**.

3. Select the FSCTransactionDisputeManagement/ThirdPartyPlaidEnrichment Integration Procedure and open the highest version.

4. Create a version of the Integration Procedure.

5. Click **CallEthocaEnrichmentApi** remote action.

6. In the Additional Input section, for **IntegrationDefinition**, enter the developer name of the integration definition you created for the Consumer Clarity enrichment provider.

7. Save and activate the Integration Procedure.

Define a Decision Matrix and Set Up an Expression Set

Use the Business Rules Engine to automate the decision-making process when identifying the transaction enrichment providers. Use a decision matrix to define the specific types of transactions eligible for enrichment and an expression set to determine the corresponding enrichment provider.

Before you begin:

- Configure the endpoints of enrichment providers. See Configure the Endpoint for Ethoca Consumer Clarity™.

- Create integration definitions for enrichment providers. See Create an Integration Definition for Ethoca Consumer Clarity™.

Decision matrices and expression sets are key components in the Business Rules Engine. Decision matrices are lookup tables that contain user-defined input and output columns. The engine takes in inputs and then looks up the appropriate outputs. When an expression set calls a decision matrix, the engine locates the table row that matches the input values and returns the output value for that row.

1. Define a decision matrix to determine which provider enriches transactions based on a given transaction code.

   a. From the App Launcher, find and select **Business Rules Engine**.

   b. From the app navigation menu, select **Lookup Tables**.

   c. Click **New**.

   d. Select **Decision Matrix** and click **Next**.

   e. For Name, enter *EnrichmentProviderMapping*, and for Type, select **Standard**.

   f. Save your changes.

   g. On the record page of your new decision matrix, on the Related tab, click version 1 of the matrix.

   h. Add columns to define your input and output data.

   The input data includes the transaction code and the output data is the enrichment provider name for each transaction code. Here's a sample decision matrix for mapping a transaction code to an enrichment provider name:

INPUT DATA	OUTPUT DATA
TransactionCode (Text)	**ProviderNames (Text Range)**
1300	EnrichmentProvider1, ConsumerClarity
1400	EnrichmentProvider1
1500	ConsumerClarity

    i.   Save and activate your decision matrix.

          After you create the decision matrix, reference it from the Identify Enrichment Provider expression set template.

2. Set up an expression set to map the corresponding enrichment provider for each transaction code.

    a.   From the App Launcher, find and select **Business Rules Engine**.

    b.   From the app navigation menu, select **Expression Set Templates**.

    c.   From the expression set templates list view, click **Identify Enrichment Provider**.

    d.   Click **Save As**.

          The template is cloned and saved as an expression set. You can find the expression set in the expression set list.

    e.   Open the expression set properties.

    f.   In the Rank field, enter a rank number.

          When more than one enabled version matches an expression set call, and the date-time periods overlap, the version with the highest rank is chosen. For example, if two enabled versions have rank values set to 1 and 2, the version with rank 2 is chosen.

    g.   Activate the expression set.

          After you activate the expression set, reference it in the FSC/TransactionDisputeEnrichment Integration Procedure.

3. Update the Integration Procedure with the expression set name.

    a.   From the App Launcher, find and select **OmniStudio**.

    b.   In the OmniStudio app, from the navigation bar, select **Integration Procedures**.

    c.   Select the FSC/TransactionDisputeEnrichment Integration Procedure and open the highest version.

    d.   Create a version of the Integration Procedure.

    e.   Click **EnrichmentExpressionSetAction** expression set action.

    f.   In the Configuration Name field, enter the name of the expression set.

    g.   Save and activate the Integration Procedure.

Configure Dispute Intake without Transaction Enrichment

Transaction Enrichment is an optional feature in Transaction Dispute Management. If you don't want to enrich the financial transactions with merchant information, deactivate the enrichment-related components in the dispute intake OmniScript.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniScripts**.

3. Select the FSC/TransactionDisputeManagement OmniScript and open version 1 of the OmniScript.

4. Create a version of the OmniScript.

5. In the new version of the OmniScript, locate and select the **FSCTransactionDisputeManagement_TransactionsEnrichment** integration procedure component.

6. In the component's properties, click the **Active** toggle button to deactivate the component.

7. Similarly, locate each of these components in the OmniScript and deactivate them.

COMPONENT NAME	COMPONENT TYPE
SegregateTransactions	Remote Action
CallConsumerClarityEnrichmentApi	Integration Procedure
CallPlaidEnrichmentApi	Integration Procedure

8. Activate the OmniScript.

Enable Merchant Alerts for Disputed Transactions

Transaction Dispute Management integrates with Ethoca Merchant Alerts™ to notify merchants about disputed transactions through alerts. With this integration, you can communicate with the merchants involved in disputed transactions and reduce the likelihood of chargebacks. The alert statuses and outcomes are stored in Salesforce. Your dispute processing team can use the alert status and outcome to monitor the dispute resolution workflow and facilitate faster dispute resolutions.

Configure the Endpoint of Merchant Alerts Provider

Transaction Dispute Management integrates with Ethoca Merchant Alerts™ to raise merchant alerts for disputed transactions. Create an external credential with the details of how Salesforce authenticates to the merchant alert provider.

Create Integration Definitions for Merchant Alerts Provider

Transaction Dispute Management uses integration definitions to specify the details of how Salesforce communicates with Ethoca Merchant Alerts™ to raise alerts for disputed transactions.

Update the Integration Procedure with Integration Definition Names

Add the developer names of the integration definitions used for checking the alert status and outcome of disputed transactions, and for retrying the action of submitting the disputed transactions in the FSCTransactionDisputeManagement/GetAlertStatus Integration Procedure.

Update the Process Disputed Transactions Flow Orchestrator

When a service catalog request record is created for a transaction dispute service process request, the Process Disputed Transactions flow orchestrator calls an action to submit all the valid transactions in the dispute request to a merchant alert provider to raise merchant alerts. Update the flow orchestrator with the service catalog definition ID and Integration definition name to establish a secured connection with the merchant alert provider.

View Merchant Alert Status and Outcome

When a service catalog request record is created for a transaction dispute service process request, the Process Disputed Transactions flow orchestrator calls an action to submit all the valid transactions in the dispute request to Ethoca Merchant Alerts™ to raise alerts. To show your dispute case owners the alert status and outcome of the submitted disputed transactions, add the FSCTransactionDisputeManagementShowAlertStatus FlexCard to the case record page.

Configure the Endpoint of Merchant Alerts Provider

Transaction Dispute Management integrates with Ethoca Merchant Alerts™ to raise merchant alerts for disputed transactions. Create an external credential with the details of how Salesforce authenticates to the merchant alert provider.

Before you begin, ensure that you enabled user access to the User External Credentials object. See Enable User Access to User External Credentials Object.

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

2. To create an external credential, go to External Credentials, and then click **New**.

3. Enter a label and a name for the external credential.

4. From the Authentication Protocol dropdown list, select **Basic Authentication**.

5. Save your changes.

6. From the external credentials list view, select the external credential you created.

7. To create a principal for this external credential, click **New**.

8. Enter a parameter name and a sequence number.

9. From the Identity Type dropdown list, select **Named Principal**.

10. Enter a username and a password.

11. Save your changes.

12. Enable the external credential principal for users.

    To make callouts to the external merchant alert provider, give profiles access to the principal of the external credential that you created. For more information, see Enable External Credential Principals.

13. To create a named credential to reference the external credential you created, go to Named Credentials and then click **New**.

14. Enter a label and a name for the named credential.

    Make a note of the named credential name. Use it to update the integration definition.

15. In the **URL** field, enter the URL of the callout endpoint.

16. From the External Credential dropdown list, select the external credential that you created.

17. Save your changes.

Create Integration Definitions for Merchant Alerts Provider

Transaction Dispute Management uses integration definitions to specify the details of how Salesforce communicates with Ethoca Merchant Alerts™ to raise alerts for disputed transactions.

Before you begin, ensure that you created the needed external credentials. See Configure the Endpoint of Merchant Alerts Provider .

1. From Setup, in the Quick Find box, enter `Integrations Definitions`, and then select **Integration Definitions**.

2. Click + New.

3. For Type, select Apex Defined.

4. Enter a name and a developer name for the integration definition.

Make a note of the developer name of the integration definition. Use it to update the Process Disputed Transactions flow orchestrator.

5. Click **Next**.

6. Search for and select the disputemanagement.FSCSubmitTrxnAlertIntegrationProvider Apex class.

The integration definition uses this Apex class to submit valid disputed transactions to the merchant alert provider.

7. For Attribute Value, enter the name of the named credential that you created earlier for the merchant alerts provider.

8. Save and activate the integration definition.

9. To check the alert status and outcome of the submitted disputed transactions, create another integration definition with these details.

APEX CLASS	ATTRIBUTE NAME	ATTRIBUTE VALUE
disputemanagement.FSCRefreshAlertStatusIntegrationProvider	Named Credential	For Attribute Value, enter the name of the named credential that you created earlier for the merchant alerts provider.

Make a note of the developer name of the integration definition. Use it to update the FSCTransactionDisputeManagement/GetAlertStatus integration procedure.

10. Save and activate the integration definition.

11. To retry the action of submitting the disputed transactions to the merchant alert provider, create another integration definition with these details.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To create Apex-defined integration definitions:
- Customize Application

APEX CLASS	ATTRIBUTE NAME	ATTRIBUTE VALUE
disputemanagementFSCRetrySubmitTxnAlertIntegrationProvider	Named Credential	For Attribute Value, enter the name of the named credential that you created earlier for the merchant alerts provider.

Make a note of the developer name of the integration definition. Use it to update the FSCTransactionDisputeManagement/GetAlertStatus integration procedure.

12. Save and activate the integration definition.

Update the Integration Procedure with Integration Definition Names

Add the developer names of the integration definitions used for checking the alert status and outcome of disputed transactions, and for retrying the action of submitting the disputed transactions in the FSCTransactionDisputeManagement/GetAlertStatus Integration Procedure.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **Integration Procedures**.

3. Select the **FSCTransactionDisputeManagement/GetAlertStatus** Integration Procedure and open the highest version.

4. Create a version of the Integration Procedure.

5. Click **CheckStatusIntegrationProvider** remote action.

6. In the Additional Input section, for **IntegrationDefinition**, enter the developer name of the integration definition you created earlier for checking the alert status and outcome of disputed transactions.

7. Click **RetryFetchStatus** remote action.

8. In the Additional Input section, for **IntegrationDefinition**, enter the developer name of the integration definition you created earlier for retrying the action of submitting the disputed transactions.

9. Save and activate the Integration Procedure.

Update the Process Disputed Transactions Flow Orchestrator

When a service catalog request record is created for a transaction dispute service process request, the Process Disputed Transactions flow orchestrator calls an action to submit all the valid transactions in the dispute request to a merchant alert provider to raise merchant alerts. Update the flow orchestrator with the service catalog definition ID and Integration definition name to establish a secured connection with the merchant alert provider.

1. In Setup, in the Quick Find box, enter `Flow`, and then click **Flows**.

2. Click **New Flow**.

3. Click **All + Templates** and select **Flow Orchestration**.

4. Select **Process Disputed Transactions** and click **Create**.

5. Save the flow orchestrator.

6. Enter an orchestration label and an API name.

7. Save your changes.

8. On the **Process Disputed Transactions** flow orchestrator screen, click the **Record-Triggered Orchestration Start** element.

9. Under **Set Entry Conditions**, update the value of the **SVcCatalogItemDefinitionId** field with the ID of the active transaction dispute service process definition.

   To find the SVcCatalogItemDefinitionIdID, in Service Process Studio, open the service process definition that you created for the transaction dispute service process. In the address bar of your browser, the value shown for the serviceProcessDefinitionId parameter is the value for SVcCatalogItemDefinitionIdID.

10. On the **Process Disputed Transactions** flow orchestrator screen, select the **Submit Disputed Transactions** background step.

11. Under **Set Input Values for the Selected Action**, update the value of the **IntegrtationDefinitionName** variable with the name of the integration definition that you created for submitting valid disputed transactions to the merchant alerts provider.

12. Save and activate the flow orchestrator.

View Merchant Alert Status and Outcome

When a service catalog request record is created for a transaction dispute service process request, the Process Disputed Transactions flow orchestrator calls an action to submit all the valid transactions in the dispute request to Ethoca Merchant Alerts™ to raise alerts. To show your dispute case owners the alert status and outcome of the submitted disputed transactions, add the FSCTransactionDisputeManagementShowAlertStatus FlexCard to the case record page.

1. In Setup, go to **Object Manager**.

2. In the Quick Find box, enter `Case`, and then select **Case**.

3. Click **Lightning Record Pages**, and then select **Case Record Page**.

4. Click **Edit**.

5. In the Lightning App Builder, from the list of Standard components, locate and drag the **Flexcard** component onto the canvas.

6. On the FlexCard properties pane, in the **Flexcard Name** field, search for and select **FSCTransactionDisputeManagementShowAlertStatus**.

7. Save your changes, and then activate the page, if necessary.

   The FSCTransactionDisputeManagementShowAlertStatus FlexCard shows the transactions for which alerts were raised and their corresponding merchant name, alert delivery status, and alert outcome.

Enable User Access to User External Credentials Object

User external credential objects store encrypted tokens used by named credentials. You must enable user external credentials to use named credentials.

Named credentials reference external credentials, which specify authentication protocols and authorization information. In turn, external credentials use user external credentials to store encrypted authentication tokens. Any user performing an authenticated callout needs profile- or permission set-based access to user external credentials.

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

2. Click the profile for whom you want to enable user external credentials.

3. Scroll to Standard Object Permissions and find **User External Credentials**.

4. Select the box for **Read** permission.

5. Save your changes.

SEE ALSO:

Enable User External Credentials

Set Up Deflection for Disputed Transactions

Transaction deflection helps you redirect the disputed transactions based on predefined business rules and criteria. The deflection feature in Transaction Dispute Management gives you the flexibility of defining certain thresholds for transactions using an expression set. During a dispute request intake, when transactions don't satisfy the thresholds, they can be resolved without requiring further investigations.

EDITIONS

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

Build an Expression Set for Transaction Deflection

Set up an expression set to determine the deflection status of disputed transactions based on validation outcomes.

Configure Thresholds for Disputed Transactions

Define a date threshold and a disputed amount threshold for transactions. When a disputed transaction is older than the date threshold, it can be marked invalid, or if the amount disputed in a transaction is less than the disputed amount threshold, it can be cleared for automatic write-off. If a transaction is cleared for automatic write-off, the disputed amount can be credited to the customer without further investigation.

Build an Expression Set for Transaction Deflection

Set up an expression set to determine the deflection status of disputed transactions based on validation outcomes.

1. Clone the expression set template.

   a. From the App Launcher, find and select **Business Rules Engine**.

   b. From the app navigation menu, select **Expression Set Templates**.

   c. From the expression set templates list view, click **Determine Deflection Status**.

   d. Click **Save As**.

   The template is cloned and saved as an expression set. You can find the expression set in the expression set list.

   e. Open the expression set properties.

   f. In the Rank field, enter a rank number.

   When more than one enabled version matches an expression set call, and the date-time periods overlap, the version with the highest rank is chosen. For example, if two enabled versions have rank values set to 1 and 2, the version with rank 2 is chosen.

   g. Activate the expression set.

   After you activate the expression set, reference it in the FSC/DisputeManagementCaseDeflection Integration Procedure.

2. Update the Integration Procedure with the expression set name.

   a. From the App Launcher, find and select **OmniStudio**.

   b. In the OmniStudio app, from the navigation bar, select **Integration Procedures**.

   c. Select the FSC/DisputeManagementCaseDeflection Integration Procedure and open the highest version.

   d. Create a version of the Integration Procedure.

   e. Click **CaseDeflectionExpressionSetAction** expression set action.

EDITIONS

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

USER PERMISSIONS

To save an expression set template as an expression set version:
- Rule Engine Designer

To run expression sets:
- Rules Engine Runtime

To update Integration Procedures:
- OmniStudio Admin

To run Integration Procedures:
- OmniStudio User

   f. In the **Configuration Name** field, enter the name of the expression set.

   g. Save and activate the Integration Procedure.

Configure Thresholds for Disputed Transactions

Define a date threshold and a disputed amount threshold for transactions. When a disputed transaction is older than the date threshold, it can be marked invalid, or if the amount disputed in a transaction is less than the disputed amount threshold, it can be cleared for automatic write-off. If a transaction is cleared for automatic write-off, the disputed amount can be credited to the customer without further investigation.

1. Open the expression set and view expression set resources.

   a. From the App Launcher, find and select Business Rules Engine.

   b. From the app navigation menu, select Expression Sets.

   c. Select the expression set that you cloned from the expression set template.

   d. On the Details page of your expression set, click the version of the expression set to update.

   e. To see the expression set resources, open the Resource Manager.

2. Configure the date threshold.

   a. Under **Constants**, edit each of these variables to update the date threshold.

VARIABLE	DESCRIPTION	CURRENT DEFAULT VALUE
CAAgeLimit CAAgeLimitText	Represents the value of the date threshold for transactions made through a checking account.	60
CCAgeLimit CCAgeLimitText	Represents the value of the date threshold for transactions made through a credit card.	90
DefaultAgeLimit DefaultAgeLimitText	Represents the value of the date threshold for transactions made through any other account except current account and credit card.	180

   b. Update the current default values to new values that suit your business needs. If a transaction is older than the number of days specified in the default value field, then the transaction is marked invalid and it's not eligible for dispute.

3. Configure the disputed amount threshold.

   a. Under **Constants**, edit each of these variables to update the disputed amount threshold.

VARIABLE	DESCRIPTION	CURRENT DEFAULT VALUE
CAAmountLimit CAAmountLimitText	Represents the value of the disputed amount threshold for transactions made through a checking account.	50

VARIABLE	DESCRIPTION	CURRENT DEFAULT VALUE
CCAmountLimit	Represents the value of the disputed amount threshold for transactions made through a credit card.	100
CCAmountLimitText		
DefaultAmountLimit	Represents the value of the disputed amount threshold for transactions made through any other account except current account and credit card.	200
DefaultAmountLimitText		

    b. Update the current default values to new values that suit your business needs. If the amount disputed in a transaction is less than the amount specified in the default value field, then the transaction is cleared for automatic write-off.

4. After you configure the new thresholds, save and activate the expression set.

Associate the Dispute Intake OmniScript to an Action Launcher Deployment

The FSC/TransactionDisputeManagement OmniScript guides users in capturing a customer dispute request. Agents can launch this Omniscript from the record details page of a person account to capture a dispute request.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. Configure an action launcher deployment for the OmniScript.

Give your users quick access to the dispute intake form (OmniScript). If you have an existing action launcher deployment, add the dispute intake form to it.

    a. From Setup, in the Quick Find box, enter `Action Launcher`, and select **Action Launcher**.

    b. Click **New Deployment** and give it a name.

    c. In Guidance to Show, select **OmniScripts**.

    d. In the Available Objects list, move **Account** to Selected Objects.

        The selected objects determine the objects where you can show the dispute intake form.

    e. In Select actions to add, select **/FSC/TransactionDisputeManagement/English**.

    f. Next to the OmniScript, click the add icon.

    g. Save your changes.

2. Add the OmniScript to the Person Account page.

    a. In Setup, go to Object Manager.

    b. In the Quick Find box, enter `Account`, and then select **Account**.

    c. Click **Lightning Record Pages** and select **Account Record Page**.

    d. Click **Edit**.

e. In the Lightning App Builder, drag the **Action Launcher** component onto the record page.

f. In the properties pane, select the action launcher deployment that contains the dispute intake OmniScript.

g. Save your changes.

Activate the Transaction Dispute Service Process

Associate the dispute intake OmniScript and the integration definition with the service process definition and activate the transaction dispute service process.

- Enable the OmniStudio Metadata setting. For more information, see Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. For more information, see Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and select **Service Process Studio**.

2. In the service processes list view, locate the service process you created for handling transaction disputes and from its quick action menu, click **Edit**.

3. Click **Request Form** and add the dispute intake OmniScript.

4. Save your changes.

5. Click **Integration Definition** and add the integration definition you created earlier.

6. Save your changes.

7. Activate the Service Process.

Dispute Intake OmniScript Components

You can customize the dispute intake OmniScript to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetAccountContext	Integration procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Transaction Dispute Management service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	SelfService_SetAccountContext integration procedure
FSC_TransactionDisputeManagementGetFinancialAccounts	Integration procedure action	Retrieves Financial Accounts associated with a Person Account.	FSC_GetFeeReversalFinancialAccounts integration procedure

Component Name	Component Type	What It Does	What It Calls
FSC_TransactionDisputeManagementGetCustomerInformation	DataRaptor extract action	Retrieves the Person Account details.	FSCTransactionDisputeManagementGetCustomerInfo data raptor
SelectFinancialAccount	Step	Displays a selectable list of accounts.	FSCTransactionDisputeManagementShowCustomerInformation and FSCTransactionDisputeManagementShowFinancialAccounts flex cards
CheckIfFinancialAccountSelected	Set values	Sets the value if the financial account has been selected in the SelectFinancialAccount step.	None
SetFinancialAccountSelectionError	Set errors	Displays an error message if no financial account is selected.	None
SetSelectedFinancialAccount	Set values	Assembles information about the selected financial account.	None
SSIDError	Set errors	Shows an error in case there's no SSID present in the selected financial account record.	None
GenerateRequestGuid	Remote action	Creates a unique GUID for each dispute request.	disputemanagementDisputeManagementHelper class, generateRequestGuid method
SelectTransactions	Step	Displays a selectable list of transactions.	FSCTransactionDisputeManagementShowCustomerInformation and FSCTransactionDisputeManagementShowTransactions flex cards
CheckIfTransactionSelected	Set values	Sets the value if at least one transaction was selected in the SelectTransaction step	None
SetTransactionSelectionError	Set errors	Displays an error message if no transaction is selected.	None
SetDisputedTransactionsBeforeEnrichment	Set values	Sets up Transaction Dispute Management for dispute intake with or without transaction enrichment enabled.	None
FSCTransactionDisputeManagement_TransactionEnrichment	Integration procedure action	Calls the expression set and decision matrix to append the enrichment provider information to the transactions.	FSCTransactionDisputeManagement_AppendEnrichment integration procedure
SegregateTransactions	Remote action	Separates transactions according to the enrichment provider.	disputemanagementDisputeManagementHelper class, segregateTransactions method

Component Name	Component Type	What It Does	What It Calls
SetBREConfigurationError	Set errors	Shows an error message if the expression set that's set up to deflect transactions is configured incorrectly.	None
SetTransactionsCountForProviders	Set values	Sets the count for the total number of transactions going to each enrichment provider.	None
CallConsumerClarityEnrichmentAPI	Integration procedure action	Calls the Ethoca Consumer Clarity™ enrichment API for enriching the transactions.	FSCTransactionDisputeManagement_TriPartyEnrichment integration procedure
SetErrorOnConsumerClarityApiFailure	Set errors	Shows an error if the Ethoca Consumer Clarity enrichment is configured incorrectly.	None
SetSelectedTransactions	Remote action	Assembles information about the selected transactions.	disputemanagementDisputeManagementHelper class, setTransactions method
FSC_TransactionDisputeManagementGetCardTransactionCodes	DataRaptor extract action	Retrieves the unique code that identifies the type of transaction.	FSCTransactionDisputeManagementGetCardTxnCodes data raptor
ContainsCardTransactionsAction	Remote action	Returns True if one of the selected transactions is a card-type transaction, otherwise returns False.	disputemanagementDisputeManagementHelper class, containsCardTransactions method
ReviewTransactionsinformation	Step	Shows the list of transactions selected in the SelectTransactions step with enriched merchant information	FSCTransactionDisputeManagementShowCustomerInformation FSCTransactionDisputeManagementShowEnrichedTransactionsList FSCTransactionDisputeManagementShowTransactionRecognizeText Lightning Web Components
SetResolvedTransactions	Set values	Sets the transactions that were marked recognized in the ReviewTransactionsinformation screen.	None
UpdateDisputedTransactionsAfterEnrichment	Remote action	Updates the list of disputed transactions after enrichment provider data is added.	disputemanagementDisputeManagementHelper class, updateDisputedTransactionsAfterEnrichment method
ValidateDisputedTransactions	Remote action	Checks the disputed amounts in each transaction for errors.	disputemanagementDisputeManagementHelper class, validateDisputedTransactions method
DisputedAmountError	Set errors	Shows an error message if the disputed amount entered is greater than the transaction	None

Component Name	Component Type	What It Does	What It Calls
		amount or the disputed amount is a negative number.	
RunCaseDeflectionRules	Integration procedure action	Runs deflection rules for each unrecognized transaction and updates transactions with outcome.	FSC_DisputeManagementCaseDeflection integration procedure
FilterTransactions	Remote action	Returns HasValidTransactions, HasInvalidTransactions, and HasClearForWriteOffTransaction boolean values based on deflection outcomes. It also returns three lists of transactions based on deflection outcomes.	disputemanagementDisputeManagementHelper class, filterTransactions method
EnterDisputeDetails	Step	Shows the deflection scope messages, and prompts the user to select a dispute reason.	FSCTransactionDisputeManagementShowCustomerInformation, FSCTransactionDisputeManagementShowDeflectionScopeMessage, FSCTransactionDisputeManagementShowAutoWriteOffScopeMessage, FSCTransactionDisputeManagementShowInvalidTransactionScopeMessage, FSCTransactionDisputeManagementAutoWriteOffAndInvalidScopeMessage flex cards
ConvertUploadedDocs	Remote action	Converts the uploaded documents in a format needed to be displayed in the Review Summary step.	disputemanagementDisputeManagementHelper class, convertUploadedDocuments method
SetDisputedTransactions	Remote action	Sets the disputed amount for the transactions.	disputemanagementDisputeManagementHelper class, validateDisputedTransactions method
FSC_TransactionDisputeManagementGetDisputeType	DataRaptor extract action	Retrieves Dispute Type of the transaction based on the Dispute Subtype.	FSCTransactionDisputeManagementGetDisputeType data raptor
ProvideAdditionalDetails	Step	A placeholder step. Replace this step with the FSC/DisputeDetails OmniScript to add a questionnaire for assessing disputed transactions.	None
ReviewSummary	Step	Displays the transactions to be disputed, lists the dispute reason and dispute details, and presents a Submit button for the user to confirm the dispute request.	FSCTransactionDisputeManagementShowCustomerInformation, FSCTransactionDisputeManagementShowSelectedTransactions flex cards
SubmitAssessment	Remote action	Submits the assessment question responses.	devopsimpkg13.StoreResponses class, invoke method

Component Name	Component Type	What It Does	What It Calls
CallConnectApiFromApex	Remote action	Creates a case for the transaction dispute request.	disputemanagementDisputeManagementHelper class, raiseDispute method
SetConnectApiResponse	Set values	Sets values based on the case.	None
DeleteAssessment	Remote action	Conditional step for deleting the assessment if the connect API fails.	disputemanagementDisputeManagementHelper class, deleteAssessmentResponses method
SetCaseUrl	Set values	Sets the case URL for the submitted disputed request.	None
ViewConfirmation	Step	Displays dispute request status and presents a case URL for the user if the dispute request was submitted.	None
SetDisputeClosed	Set values	Sets the value of DisputeClosed to true if all the disputed transactions are recognized, or cleared for automatic write-off, or invalid.	None
CaseCloseConfirmation	Step	Displays a confirmation message indicating that the dispute request is closed because all the disputed transactions were recognized, or cleared for automatic write-off, or invalid.	FSCTransactionDisputeManagementShowCustomerInformation FlexCard

Submit a Transaction Dispute Request

Your service agents can capture and submit a transaction dispute request through the dispute intake OmniScript. A case is then created in Salesforce.

1. On the customer's Person Account record page, in the action launcher, click **Raise Transaction Dispute**.

2. Select a financial account.

3. Select the transactions to be disputed.

   A maximum of 100 recent transactions are shown. You can use filters to narrow down the results or find the transactions that aren't shown in the list.

4. Review the selected transactions, edit the disputed amount, if necessary, and identify the transactions that your customers can recognize.

   If transaction enrichment is configured, then the selected transactions are enriched with additional merchant-related information, such as merchant name, logo, and URL. You can use this information to help your customers recall the details of the transactions they're disputing.

5. Select the transactions that your customers can recognize.

   If all the transactions are marked as recognized, you can close the dispute request.

6. If any of the transactions weren't marked as recognized in the previous step, and if transaction deflection is configured, then based on pre-defined thresholds, the transactions can be eligible for dispute, or cleared for automatic write-off, or marked as invalid.

7. Select a dispute reason for the transactions that are eligible for dispute and cleared for automatic write-off.

8. Collect additional details related to the dispute using the dynamic questionnaire.

   Only the questions associated with the dispute are shown. Additionally, if any of the selected transactions were made using a debit or credit card, specific card-related questions are shown.

9. Review the details of the transaction dispute request and submit.

   A case is created in Salesforce for the submitted transaction dispute request. Additionally, Dispute, Dispute Item, Dispute Item Merchant Alert, Assessment, and Document Checklist Items records are created to store the details captured during the intake. The Dispute processing team can use these records to monitor the dispute workflow.

Notify Travel Plans Service Process

The Notify Travel Plans service process simplifies the travel experience for your customers, enabling them to provide notice about their upcoming trips. This information helps you to know that the transactions are legitimate, and avoid any card-related issues during a customer's trip.

Set Up and Configure the Notify Travel Plans Service Process
Use the Service Process Studio to enable the Notify Travel Plans service process to give your agents an easy-to-follow process for capturing upcoming travel plans of your customers.

Submit a Notify Travel Plans Request
Your service agents can capture and submit a travel plan request through the Notify Travel Plans OmniScript. A case is then created in Salesforce.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To submit a transaction dispute request:
- OmniStudio User

  AND

  Read and View All permissions for Omni Processes object

  AND

  Financial Services Cloud Standard

  OR

  Financial Services Cloud Extension

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Set Up and Configure the Notify Travel Plans Service Process

Use the Service Process Studio to enable the Notify Travel Plans service process to give your agents an easy-to-follow process for capturing upcoming travel plans of your customers.

Assign Permissions for the Notify Travel Plans Service Process

To use the Notify Travel Plans service process, assign relevant permissions to your users.

Deploy the Notify Travel Plans OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Notify Travel Plans service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Notify Travel Plans Service Process Communications

Add your company logo in an Email template and use it with the Notify Travel Plans service process for customer interactions.

Prepare the Notify Travel Plans OmniScript

The Notify Travel Plans OmniScript contains FlexCards that show account and card details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Notify Travel Plans Service Process

The Notify Travel Plans service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Notify Travel Plans service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Notify Travel Plans Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Notify Travel Plans Service Process

To get financial accounts information from a core banking system in the Notify Travel Plans OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Notify Travel Plans OmniScript to an Action Launcher Deployment

The FSC/NotifyTravelPlans OmniScript guides users in capturing a customer request to update the travel plan details. Agents can launch this OmniScript from the record details page of a person account to capture travel plan details.

Notify Travel Plans OmniScript Components

Customize the Notify Travel Plans OmniScript to suit your business needs.

Assign Permissions for the Notify Travel Plans Service Process

To use the Notify Travel Plans service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Notify Travel Plans service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Notify Travel Plans service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Notify Travel Plans service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Notify Travel Plans service process.

Deploy the Notify Travel Plans OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Notify Travel Plans service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Notify Travel Plans service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **NotifyTravelPlansOmniElements** static resource.

   c. Click **View file**.

   NotifyTravelPlansOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To view and edit static resources:
- Customize Application

Incorporate Your Company Logo in Notify Travel Plans Service Process Communications

Add your company logo in an Email template and use it with the Notify Travel Plans service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Travel Notification**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To activate and deactivate flows:
- Manage flow

Prepare the Notify Travel Plans OmniScript

The Notify Travel Plans OmniScript contains FlexCards that show account and card details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for *FSCNotifyTravelPlansShowDebitCards*, and then select **FSCNotifyTravelPlansShowDebitCards**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load these FlexCards:

FLEXCARDS
FSCNotifyTravelPlansShowCreditCards
FSCNotifyTravelPlansShowNoActiveCards
FSCNotifyTravelPlansShowSelectedCards
FSCServiceProcessShowAccountDetails
FSCServiceProcessSelectShippingPreference
FSCServiceProcessShowAddresses
FSCDisplayNewCaseConfirmationIcon

Manage Data Attributes and Activate the Notify Travel Plans Service Process

The Notify Travel Plans service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Notify Travel Plans service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.
2. Locate the Notify Travel Plans service process and from its quick actions menu, click **Edit**.
3. From the navigation pane of the Service Process Definition, select **Data Attributes**.
4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.
5. If you added or modified any data attributes, save your changes.
6. Activate the service process definition.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To activate the service process definition in Service Process Studio:
- Industry Service Excellence

Update the Page Layouts with Source System ID and Card Number for Notify Travel Plans Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Connect to MuleSoft and Enable Integration for Notify Travel Plans Service Process

To get financial accounts information from a core banking system in the Notify Travel Plans OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Notify Travel Plans OmniScript to an Action Launcher Deployment

The FSC/NotifyTravelPlans OmniScript guides users in capturing a customer request to update the travel plan details. Agents can launch this OmniScript from the record details page of a person account to capture travel plan details.

1. Configure an action launcher deployment and add the Notify Travel Plans OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Notify Travel Plans OmniScript Components

Customize the Notify Travel Plans OmniScript to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Notify Travel Plans service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	Service_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetStateList	Set values	Retrieves the list of states in the United States.	None
GetCardDetails	Integration Procedure action	Retrieves the list of credit or debit cards based on the financial account's record type.	NotifyTravelPlans_GetCardDetails Integration Procedure
GetSelectedCards	Integration Procedure action	Merges the list of selected debit and credit cards and returns the merged data.	NotifyTravelPlans_GetSelectedCards Integration Procedure
CreateCase	Remote action	Creates a case for the Notify Travel Plans service request.	NotifyTravelPlansHelperFunctions class and callCreateCaseApi method

Component Name	Component Type	What It Does	What It Calls
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Notify Travel Plans service request.	None

Submit a Notify Travel Plans Request

Your service agents can capture and submit a travel plan request through the Notify Travel Plans OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the Action Launcher, click **Notify Travel Plans**.

2. Select a financial account.

3. Select the active credit and debit cards.

4. Provide the travel details, such as date of travel, place of travel.

5. Provide the contact details, such as email and phone numbers.

6. Review the details of the notify travel plans request and submit the request.

   A case is created in Salesforce for the submitted travel plan notification.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To submit a notify travel plans request:
- OmniStudio User

  AND

  Read and View All permissions for Omni Processes object

  AND

  Financial Services Cloud Basic

  OR

  Financial Services Cloud Standard

  OR

  Financial Services Cloud Extension

Update Email or Phone Service Process

The Update Email or Phone service process allows your customers to maintain accurate contact information, receive timely information, and enhance security through proper communication.

Set Up and Configure the Update Email or Phone Service Process

Use the Service Process Studio to enable the Update Email or Phone service process to give your agents an easy-to-follow process for capturing contact details of your customers.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Submit an Update Email or Phone Request

Your service agents can capture and submit an email or phone update request through the Update Email or Phone OmniScript. A case is then created in Salesforce.

Set Up and Configure the Update Email or Phone Service Process

Use the Service Process Studio to enable the Update Email or Phone service process to give your agents an easy-to-follow process for capturing contact details of your customers.

Assign Permissions for the Update Email or Phone Service Process

To use the Update Email or Phone service process, assign relevant permissions to your users.

Deploy the Update Email or Phone OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Update Email or Phone service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Update Email or Phone Service Process Communications

Use your company logo in an Email template and use it with the Update Email or Phone service process for customer interactions.

Manage Data Attributes and Activate the Update Email or Phone Service Process

The Update Email or Phone service process has predefined data attributes. You can create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Update Email or Phone service process when the needed data attributes are ready.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Update Email or Phone OmniScript to an Action Launcher Deployment

The FSC/UpdateEmailorPhone OmniScript guides users in capturing a customer request to update their contact details. Agents can launch this OmniScript from the record details page of a person account to capture contact details.

Update Email or Phone OmniScript Components

Customize these Update Email or Phone OmniScript components to suit your business needs.

Assign Permissions for the Update Email or Phone Service Process

To use the Update Email or Phone service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Update Email or Phone service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Update Email or Phone service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Update Email or Phone service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Update Email or Phone service process.

Deploy the Update Email or Phone OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Update Email or Phone service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Update Email or Phone service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **UpdateEmailorPhoneOmniElements** static resource.

   c. Click **View file**.

   UpdateEmailorPhoneOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Update Email or Phone Service Process Communications

Use your company logo in an Email template and use it with the Update Email or Phone service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Contact Update**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Manage Data Attributes and Activate the Update Email or Phone Service Process

The Update Email or Phone service process has predefined data attributes. You can create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Update Email or Phone service process when the needed data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Update Email or Phone service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To activate the service process definition in Service Process Studio:
- Industry Service Excellence

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Update Email or Phone OmniScript to an Action Launcher Deployment

The FSC/UpdateEmailorPhone OmniScript guides users in capturing a customer request to update their contact details. Agents can launch this OmniScript from the record details page of a person account to capture contact details.

1. Configure an action launcher deployment and add the Update Email or Phone OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Update Email or Phone OmniScript Components

Customize these Update Email or Phone OmniScript components to suit your business needs.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Update Email or Phone service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	SelfService_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
PhoneCountryCode	Select properties	Shows a list of country code values for the phone number.	None
MobileCountryCode	Select properties	Shows a list of country code values for the mobile number.	None
CreateCase	Remote action	Creates a case for the Update Email or Phone service request.	UpdateEmailorPhoneHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Update Email or Phone service request.	None

Submit an Update Email or Phone Request

Your service agents can capture and submit an email or phone update request through the Update Email or Phone OmniScript. A case is then created in Salesforce.

1. On the customer's Person Account record page, in the Action Launcher, select the action to start the update email or phone service request.

2. Select the email address, phone number, or the mobile number to be updated.

3. Enter the new email address, phone number, or the mobile number.

4. Review the updated email and phone number details and submit the request.

   A case is created in Salesforce for the submitted email or phone update request.

Stop Check Payment Service Process

The Stop Check Payment service process allows your customers to cancel a check payment, which isn't processed yet. They can cancel a check payment if there's a theft, cancellation, or any other reasons for which the payment is to be stopped.

Set Up and Configure the Stop Check Payment Service Process

Use the Service Process Studio to enable the Stop Check Payment service process to give your agents an easy-to-follow process for capturing stop check payment requests of your customers.

Submit a Stop Check Payment Request

Your service agents can capture and submit a stop check payment request through the Stop Check Payment OmniScript. A case is then created in Salesforce.

Set Up and Configure the Stop Check Payment Service Process

Use the Service Process Studio to enable the Stop Check Payment service process to give your agents an easy-to-follow process for capturing stop check payment requests of your customers.

Assign Permissions for the Update Stop Check Payment Service Process

To use the Stop Check Payment service process, assign relevant permissions to your users.

Deploy the Stop Check Payment OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Stop Check Payment service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Stop Check Payment Service Process Communications

Use your company logo in an Email template and use it with the Stop Check Payment service process for customer interactions.

Prepare the Stop Check Payment OmniScript

The Stop Check Payment OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Stop Check Payment Service Process

The Stop Check Payment service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Stop Check Payment service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Stop Check Payment Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Stop Check Payment Service Process

To get financial accounts information from a core banking system in the Stop Check Payment OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Stop Check Payment OmniScript to an Action Launcher Deployment

The FSC/StopCheckPayment OmniScript guides users in capturing a customer request to stop a check payment. Agents can launch this OmniScript from the record details page of a person account to capture the stop check payment details.

Stop Check Payment OmniScript Components

Customize these Stop Check Payment OmniScript components to suit your business needs.

Assign Permissions for the Update Stop Check Payment Service Process

To use the Stop Check Payment service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Stop Check Payment service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Stop Check Payment service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Stop Check Payment service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Stop Check Payment service process.

Deploy the Stop Check Payment OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Stop Check Payment service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Stop Check Payment service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **StopCheckPaymentOmniElements** static resource.

   c. Click **View file**.

      StopCheckPaymentOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Stop Check Payment Service Process Communications

Use your company logo in an Email template and use it with the Stop Check Payment service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Stop Check Payment**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Stop Check Payment OmniScript

The Stop Check Payment OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for `FSCStopCheckPaymentShowFinancialAccounts`, and then select **FSCStopCheckPaymentShowFinancialAccounts**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load the **FSCStopCheckPaymentShowDetails** FlexCard.

Manage Data Attributes and Activate the Stop Check Payment Service Process

The Stop Check Payment service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Stop Check Payment service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Stop Check Payment service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Stop Check Payment Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

Connect to MuleSoft and Enable Integration for Stop Check Payment Service Process

To get financial accounts information from a core banking system in the Stop Check Payment OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

Associate the Stop Check Payment OmniScript to an Action Launcher Deployment

The FSC/StopCheckPayment OmniScript guides users in capturing a customer request to stop a check payment. Agents can launch this OmniScript from the record details page of a person account to capture the stop check payment details.

1. Configure an action launcher deployment and add the Stop Check Payment OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Stop Check Payment OmniScript Components

Customize these Stop Check Payment OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Stop Check Payment service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	sfscore_SetServiceProcessAccountContext Integration Procedure

Component Name	Component Type	What It Does	What It Calls
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a Person Account.	StopCheckPayment_GetFinancialAccounts Integration Procedure
StopPayReason	Select properties	Shows the reason to stop check payment.	None
CreateCase	Remote action	Creates a case for the Stop Check Payment service request.	StopCheckPaymentHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Stop Check Payment service request.	None

Submit a Stop Check Payment Request

Your service agents can capture and submit a stop check payment request through the Stop Check Payment OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for raising the stop check payment service request.

2. Select a financial account.

3. Select a check or a range of checks for which the payment is to be stopped.

4. Enter the check and payee details.

5. Select a reason for stop payment.

6. Review the stop check payment details and submit the request.

   A case is created in Salesforce for the submitted stop check payment request.

Report and Replace Cards Service Process

The Report and Replace Cards service process allows your customers to report stolen cards, block cards, and start a replacement card request.

Set Up and Configure the Report and Replace Cards Service Process

Use the Service Process Studio to enable the Report and Replace Cards service process to give your agents an easy-to-follow process for capturing customer requests to report stolen cards and request a replacement card.

Submit a Report and Replace Cards Request

Your service agents can capture and submit a customer request to report stolen cards through the Report and Replace Cards OmniScript. A case is then created in Salesforce.

Set Up and Configure the Report and Replace Cards Service Process

Use the Service Process Studio to enable the Report and Replace Cards service process to give your agents an easy-to-follow process for capturing customer requests to report stolen cards and request a replacement card.

Assign Permissions for the Report and Replace Cards Service Process

To use the Report and Replace Cards service process, assign relevant permissions to your users.

Deploy the Report and Replace Cards OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Report and Replace Cards service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Report and Replace Cards Service Process Communications

Use your company logo in an Email template and use it with the Report and Replace Cards service process for customer interactions.

Prepare the Report and Replace Cards OmniScript

The Report and Replace Cards OmniScript contains FlexCards that show the account and card details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Report and Replace Cards Service Process

The Report and Replace Cards service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Report and Replace Cards service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Report and Replace Cards Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Report and Replace Cards Service Process

To get financial accounts information from a core banking system in the Report and Replace Cards OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Report and Replace Cards OmniScript to an Action Launcher Deployment

The FSC/ReportandReplaceCards OmniScript guides users in capturing a customer request for reporting stolen cards and requesting a replacement card. Agents can launch this OmniScript from the record details page of a person account to capture the stolen card details.

Report and Replace Cards OmniScript Components

Customize these Report and Replace Cards OmniScript components to suit your business needs.

Assign Permissions for the Report and Replace Cards Service Process

To use the Report and Replace Cards service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

    a. In Setup, go to **Object Manager**.

    b. Locate each of the objects listed in this task and click **Fields & Relationships**.

    c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Report and Replace Cards service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Report and Replace Cards service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Report and Replace Cards service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

    b. Click the profile that you're editing, and click **Edit**.

    c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

    d. Save your changes.

    e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

    f. Repeat these steps for other profiles that are relevant for using the Report and Replace Cards service process.

Deploy the Report and Replace Cards OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Report and Replace Cards service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Report and Replace Cards service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **ReportandReplaceCardsOmniElements** static resource.

   c. Click **View file**.

   ReportandReplaceCardsOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Report and Replace Cards Service Process Communications

Use your company logo in an Email template and use it with the Report and Replace Cards service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Report and Replace Card**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Report and Replace Cards OmniScript

The Report and Replace Cards OmniScript contains FlexCards that show the account and card details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for `FSCReportandReplaceCardsShowDebitCards`, and then select **FSCReportandReplaceCardsShowDebitCards**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load these FlexCards:

FLEXCARDS
FSCReportandReplaceCardsShowCreditCards
FSCReportandReplaceCardsShowNoActiveCards
FSCReportandReplaceCardsShowSelectedCards
FSCReportandReplaceCardsShowAddresses
FSCReportandReplaceCardsShowSummary
FSCReportandReplaceCardsShowSummaryofCards

Manage Data Attributes and Activate the Report and Replace Cards Service Process

The Report and Replace Cards service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Report and Replace Cards service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Report and Replace Cards service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Report and Replace Cards Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Connect to MuleSoft and Enable Integration for Report and Replace Cards Service Process

To get financial accounts information from a core banking system in the Report and Replace Cards OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Report and Replace Cards OmniScript to an Action Launcher Deployment

The FSC/ReportandReplaceCards OmniScript guides users in capturing a customer request for reporting stolen cards and requesting a replacement card. Agents can launch this OmniScript from the record details page of a person account to capture the stolen card details.

1. Configure an action launcher deployment and add the Report and Replace cards OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Report and Replace Cards OmniScript Components

Customize these Report and Replace Cards OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the customer user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Report and Replace Cards service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	Service_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetCardDetails	Integration Procedure action	Retrieves the list of cards based on financial account's record type.	ReportandReplaceCards_GetCardDetails Integration Procedure
ReasonForReporting	Select properties	Shows a list of reasons for reporting and replacing cards.	None
GetSelectedCards	Integration Procedure action	Merges the list of selected debit and credit cards and returns the merged data.	ReportandReplaceCards_GetSelectedCards Integration Procedure
SelectAllCardsAction	Integration Procedure action	Selects all the available cards.	ReportandReplaceCards_SelectAllCards Integration Procedure
GroupCards	Integration Procedure action	Retrieves addresses associated with a person account.	ReportandReplaceCards_GetAccountAddresses Integration Procedure
GetAccountAddresses	Integration Procedure action	Retrieves addresses associated with a person account.	ReportandReplaceCards_GetAccountAddresses Integration Procedure
TransformSelectedCardData	Integration Procedure action	Transforms the selected card data.	ReportandReplaceCards_TransformSelectedCardData Integration Procedure

Component Name	Component Type	What It Does	What It Calls
CreateCase	Remote action	Creates a case for the Report and Replace Cards service request.	ReportandReplaceCardsHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Report and Replace Cards service request.	None

Submit a Report and Replace Cards Request

Your service agents can capture and submit a customer request to report stolen cards through the Report and Replace Cards OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for raising the report and replace cards service request.

2. Select the active debit and credit cards to be blocked.

3. Enter a reason to block the cards.

4. If you want to order a replacement for the blocked cards, select the yes option, and then select the cards to be replaced.

5. Select a shipping preference and a shipping address to send the replacement cards.

6. Review the card details and the reason for card blocking, and then submit the request.

   A case is created in Salesforce for the submitted block card request.

Order Checkbook Service Process

The Order Checkbook service process allows your customers to order a checkbook. Customers can choose the number of checks required in the checkbook and the preferred delivery mode while ordering.

Set Up and Configure the Order Checkbook Service Process

Use the Service Process Studio to enable the Order Checkbook service process to give your agents an easy-to-follow process for capturing new checkbook orders from your customers.

Submit an Order Checkbook Request

Your service agents can capture and submit a new checkbook request through the Order Checkbook OmniScript. A case is then created in Salesforce.

Set Up and Configure the Order Checkbook Service Process

Use the Service Process Studio to enable the Order Checkbook service process to give your agents an easy-to-follow process for capturing new checkbook orders from your customers.

Assign Permissions for the Order Checkbook Service Process

To use the Order Checkbook service process, assign relevant permissions to your users.

Deploy the Order Checkbook OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Order Checkbook service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Order Checkbook Service Process Communications

Use your company logo in an Email template and use it with the Order Checkbook service process for customer interactions.

Prepare the Order Checkbook OmniScript

The Order Checkbook OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Order Checkbook Service Process

The Order Checkbook service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Order Checkbook service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Order Checkbook Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Order Checkbook Service Process

To get financial accounts information from a core banking system in the Order Checkbook OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Order Checkbook OmniScript to an Action Launcher Deployment

The FSC/OrderCheckbook OmniScript guides users in capturing a customer request for a new checkbook. Agents can launch this OmniScript from the record details page of a person account to capture the checkbook order details.

Order Checkbook OmniScript Components

Customize these Order Checkbook OmniScript components to suit your business needs.

Assign Permissions for the Order Checkbook Service Process

To use the Order Checkbook service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Order Checkbook service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Order Checkbook service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Order Checkbook service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Order Checkbook service process.

Deploy the Order Checkbook OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Order Checkbook service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Order Checkbook service process.

    a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

    b. Find and select the **OrderCheckbookOmniElements** static resource.

    c. Click **View file**.

       OrderCheckbookOmniElements.zip file is downloaded.

    d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Order Checkbook Service Process Communications

Use your company logo in an Email template and use it with the Order Checkbook service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Order Checkbook**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Order Checkbook OmniScript

The Order Checkbook OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for `FSCOrderCheckbookShowFinancialAccounts`, and then select **FSCOrderCheckbookShowFinancialAccounts**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load the **FSCOrderCheckbookSummary** FlexCard.

Manage Data Attributes and Activate the Order Checkbook Service Process

The Order Checkbook service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Order Checkbook service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Order Checkbook service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Order Checkbook Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

Connect to MuleSoft and Enable Integration for Order Checkbook Service Process

To get financial accounts information from a core banking system in the Order Checkbook OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

Associate the Order Checkbook OmniScript to an Action Launcher Deployment

The FSC/OrderCheckbook OmniScript guides users in capturing a customer request for a new checkbook. Agents can launch this OmniScript from the record details page of a person account to capture the checkbook order details.

1. Configure an action launcher deployment and add the Order Checkbook OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Order Checkbook OmniScript Components

Customize these Order Checkbook OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Order Checkbook service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	sfsc_SetServiceProcessAccountContext Integration Procedure

Component Name	Component Type	What It Does	What It Calls
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
NumberofChecks	Select properties	Shows the number of check leaves you can select.	None
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a person account.	OrderCheckbook_GetFinancialAccounts Integration Procedure
GetFinancialAccountAddresses	Integration Procedure action	Retrieves addresses associated with a financial account.	OrderCheckbook_GetFinancialAccountAddresses Integration Procedure
CreateCase	Remote action	Creates a case for the Order Checkbook Plans service request.	OrderCheckbookHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Order Checkbook service request.	None

Submit an Order Checkbook Request

Your service agents can capture and submit a new checkbook request through the Order Checkbook OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action to start a new checkbook service request.

2. Select a financial account.

3. Enter the number of checks, select a shipping preference and a shipping address.

4. Review the checkbook order details and submit the request.

   A case is created in Salesforce for the submitted new checkbook request.

Request Statement Copies Service Process

The Request Statement Copies service process allows your customers to request statement copies for their financial accounts. They can choose to receive their statement copies to a preferred address either through email or post.

Set Up and Configure the Request Statement Copies Service Process

Use the Service Process Studio to enable the Request Statement Copies service process to give your agents an easy-to-follow process for capturing statement copies request.

Request Statement Copies for an Account

Your service agents can capture and submit a request for sending statement copies through the Request Statement Copies OmniScript. A case is then created in Salesforce.

Set Up and Configure the Request Statement Copies Service Process

Use the Service Process Studio to enable the Request Statement Copies service process to give your agents an easy-to-follow process for capturing statement copies request.

Assign Permissions for the Request Statement Copies Service Process
To use the Request Statement Copies service process, assign relevant permissions to your users.

Deploy the Request Statement Copies OmniStudio Elements
Ensure that the essential OmniStudio elements needed for the Request Statement Copies service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Request Statement Copies Service Process Communications
Use your company logo in an Email template and use it with the Request Statement Copies service process for customer interactions.

Prepare the Request Statement Copies OmniScript
The Request Statement Copies OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Request Statement Copies Service Process
The Request Statement Copies service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Request Statement Copies service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Request Statement Copies Service Process
Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Request Statement Copies Service Process
To get financial accounts information from a core banking system in the Request Statement Copies OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page
To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Request Statement Copies OmniScript to an Action Launcher Deployment
The FSC/RequestStatementCopies OmniScript guides users in capturing a customer request for obtaining statement copies. Agents can launch this OmniScript from the record details page of a person account to capture the details of the financial accounts and the duration for which the statement copies are needed.

Request Statement Copies OmniScript Components
Customize these Request Statement Copies OmniScript components to suit your business needs.

Assign Permissions for the Request Statement Copies Service Process

To use the Request Statement Copies service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Request Statement Copies service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Request Statement Copies service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Request Statement Copies service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Request Statement Copies service process.

Deploy the Request Statement Copies OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Request Statement Copies service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Request Statement Copies service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **RequestStatementCopiesOmniElements** static resource.

   c. Click **View file**.

   RequestStatementCopiesOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To view and edit static resources:
- Customize Application

Incorporate Your Company Logo in Request Statement Copies Service Process Communications

Use your company logo in an Email template and use it with the Request Statement Copies service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Request Statement Copies**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To activate and deactivate flows:
- Manage flow

Prepare the Request Statement Copies OmniScript

The Request Statement Copies OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for *FSCRequestStatementCopiesShowFinancialAccounts*, and then select **FSCRequestStatementCopiesShowFinancialAccounts**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load the **FSCRequestStatementCopiesShowSetDuration** and **RequestStatementCopiesShowSummary** FlexCards.

Manage Data Attributes and Activate the Request Statement Copies Service Process

The Request Statement Copies service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Request Statement Copies service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter *Service Process Studio*, and then select **Service Process Studio**.

2. Locate the Request Statement Copies service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Request Statement Copies Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

Connect to MuleSoft and Enable Integration for Request Statement Copies Service Process

To get financial accounts information from a core banking system in the Request Statement Copies OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

Associate the Request Statement Copies OmniScript to an Action Launcher Deployment

The FSC/RequestStatementCopies OmniScript guides users in capturing a customer request for obtaining statement copies. Agents can launch this OmniScript from the record details page of a person account to capture the details of the financial accounts and the duration for which the statement copies are needed.

1. Configure an action launcher deployment and add the Request Statement Copies OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Request Statement Copies OmniScript Components

Customize these Request Statement Copies OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Request Statement Copies service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	SelfService_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a Person Account.	RequestStatementCopies_GetFinancialAccounts Integration Procedure
GetAccountsAddress	Integration Procedure action	Retrieves addresses associated with a Person Account.	RequestStatementCopies_GetFinancialAccountAddress Integration Procedure
CreateCase	Remote action	Creates a case for the Request Statement Copies service request.	RequestStatementCopiesHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Request Statement Copies service request.	None

Request Statement Copies for an Account

Your service agents can capture and submit a request for sending statement copies through the Request Statement Copies OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for raising a new checkbook service request.

2. Select a financial account.

3. Select the duration for which the statement copy is needed.

4. Select the mode of delivery through which the statement copy is sent.

5. If you've selected the mode of delivery as Post, select a shipping method and a shipping address.

6. Review the details of the request for statement copies and submit the request.

   A case is created in Salesforce for the submitted request for statement copies.

Transfer Funds to Own Account Service Process

The Transfer Funds to Own Account service process allows your customers to transfer funds between their financial accounts that are either within the same bank or with a different bank.

Set Up and Configure the Transfer Funds to Own Account Service Process

Use the Service Process Studio to enable the Transfer Funds to Own Account service process to give your agents an easy-to-follow process for capturing a funds transfer request.

Submit a Request to Transfer Funds Between Accounts

Your service agents can capture and submit a request for fund transfer through the Transfer Funds to Own Account OmniScript. A case is then created in Salesforce.

Set Up and Configure the Transfer Funds to Own Account Service Process

Use the Service Process Studio to enable the Transfer Funds to Own Account service process to give your agents an easy-to-follow process for capturing a funds transfer request.

Assign Permissions for the Transfer Funds to Own Account Service Process

To use the Transfer Funds to Own Account service process, assign relevant permissions to your users.

Deploy the Transfer Funds to Own Account OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Transfer Funds to Own Account service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Transfer Funds to Own Account Service Process Communications

Use your company logo in an Email template and use it with the Transfer Funds to Own Account service process for customer interactions.

Prepare the Transfer Funds to Own Account OmniScript

The Transfer Funds to Own Account OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Transfer Funds to Own Account Service Process

The Transfer Funds to Own Account service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Transfer Funds to Own Account service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Transfer Funds to Own Account Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Transfer Funds to Own Account Service Process

To get financial accounts information from a core banking system in the Transfer Funds to Own Account OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Transfer Funds to Own Account OmniScript to an Action Launcher Deployment

The FSC/TransferFundstoOwnAccount OmniScript guides users in capturing a customer request to transfer funds. Agents can launch this OmniScript from the record details page of a person account to capture the details of the source and the destination financial account between which the funds must be transferred.

Transfer Funds to Own Account OmniScript Components

Customize these Transfer Funds to Own Account OmniScript components to suit your business needs.

Assign Permissions for the Transfer Funds to Own Account Service Process

To use the Transfer Funds to Own Account service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Transfer Funds to Own Account service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Transfer Funds to Own Account service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Transfer Funds to Own Account service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Transfer Funds to Own Account service process.

Deploy the Transfer Funds to Own Account OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Transfer Funds to Own Account service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Transfer Funds to Own Account service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **TransferFundstoOwnAccountOmniElements** static resource.

   c. Click **View file**.

   TransferFundstoOwnAccountOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Transfer Funds to Own Account Service Process Communications

Use your company logo in an Email template and use it with the Transfer Funds to Own Account service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Transfer Funds To Own Account**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Transfer Funds to Own Account OmniScript

The Transfer Funds to Own Account OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for

   FSCTransferFundsToOwnAccountShowCreditOrLoanDstinationAccount, and then select **FSCTransferFundsToOwnAccountShowCreditOrLoanDstinationAccount**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load these FlexCards:

FLEXCARDS
FSCTransferFundsToOwnAccountShowNoFinancialAccounts
FSCTransferFundsToOwnAccountShowSummary
FSCTransferFundsToOwnAccountShowDisclaimer

Manage Data Attributes and Activate the Transfer Funds to Own Account Service Process

The Transfer Funds to Own Account service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Transfer Funds to Own Account service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter *Service Process Studio*, and then select **Service Process Studio**.

2. Locate the Transfer Funds to Own Account service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Transfer Funds to Own Account Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Connect to MuleSoft and Enable Integration for Transfer Funds to Own Account Service Process

To get financial accounts information from a core banking system in the Transfer Funds to Own Account OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Transfer Funds to Own Account OmniScript to an Action Launcher Deployment

The FSC/TransferFundstoOwnAccount OmniScript guides users in capturing a customer request to transfer funds. Agents can launch this OmniScript from the record details page of a person account to capture the details of the source and the destination financial account between which the funds must be transferred.

1. Configure an action launcher deployment and add the Transfer Funds to Own Account OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Transfer Funds to Own Account OmniScript Components

Customize these Transfer Funds to Own Account OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Transfer Funds to Own Account service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	Service_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a Person Account.	TransferFundstoOwnAccount_GetFinancialAccounts Integration Procedure
GetTransferFromBalance	Integration Procedure action	Retrieves the real-time balance of the source financial account.	TransferFundstoOwnAccount_GetBalance Integration Procedure
GetTransferToBalance	Integration Procedure action	Retrieves the real-time balance of the destination financial account.	TransferFundstoOwnAccount_GetBalance Integration Procedure
Frequency	Select properties	Shows the list of payment frequencies. To add a payment frequency, update the Expression value of the CheckDurationValidationErrorOnSelectedDates formula property.	None
CreateCase	Remote action	Creates a case for the Transfer Funds to Own Account service request.	TransferFundsToOwnAccount_HelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message	None

Component Name	Component Type	What It Does	What It Calls
		for the submitted Transfer Funds to Own Account service request.	

Submit a Request to Transfer Funds Between Accounts

Your service agents can capture and submit a request for fund transfer through the Transfer Funds to Own Account OmniScript. A case is then created in Salesforce.

1. On the customer's Person Account record page, in the action launcher, select the action for raising a transfer of funds request.

2. Select a source and a destination account.

   To check the account balance in the source account, click the view balance option.

3. Select the active credit and debit cards.

4. Enter the amount to be transferred.

5. Select a transfer schedule.

   You can schedule either a one-time transfer or a recurring transfer. You can select One-time transfer for single transfers with a specific date, and Recurring transfer when you need to set up transfers with a recurring schedule. Within Recurring transfer, select Duration for transfers with a fixed end date and Installment for recurring transfers at regular intervals without a fixed end date.

6. Review the fund transfer details and submit the request.

   A case is created in Salesforce for the submitted request to transfer funds between accounts.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To submit a transfer fund to an own account request:
- OmniStudio User

   AND

   Read and View All permissions for Omni Processes object

   AND

   Financial Services Cloud Basic

   OR

   Financial Services Cloud Standard

   OR

   Financial Services Cloud Extension

Manage Standing Instructions Service Process

The Manage Standing Instructions service process allows your customers to add or modify instructions for setting up recurring and timely payments.

Set Up and Configure Manage Standing Instructions Service Process

Use the Service Process Studio to enable the Manage Standing Instructions service process to give your agents an easy-to-follow process for capturing customer requests to add standing instructions.

Add a Standing Instruction to an Account

Your service agents can capture and submit a request for adding a standing instruction through the Manage Standing Instructions OmniScript. A case is then created in Salesforce.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Set Up and Configure Manage Standing Instructions Service Process

Use the Service Process Studio to enable the Manage Standing Instructions service process to give your agents an easy-to-follow process for capturing customer requests to add standing instructions.

Assign Permissions for the Manage Standing Instructions Service Process

To use the Manage Standing Instructions service process, assign relevant permissions to your users.

Deploy the Manage Standing Instructions OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Manage Standing Instructions service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Manage Standing Instructions Service Process Communications

Use your company logo in an Email template and use it with the Manage Standing Instructions service process for customer interactions.

Prepare the Manage Standing Instructions OmniScript

The Manage Standing Instructions OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Manage Standing Instructions Service Process

The Manage Standing Instructions service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Manage Standing Instructions service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Manage Standing Instructions Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Manage Standing Instructions Service Process

To get financial accounts information from a core banking system in the Manage Standing Instructions OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Manage Standing Instructions OmniScript to an Action Launcher Deployment

The FSC/ManageStandingInstructions OmniScript guides users in capturing a customer request for adding standing instructions. Agents can launch this OmniScript from the record details page of a person account to capture the details of the standing instructions for setting up recurring and timely payments.

Manage Standing Instructions OmniScript Components

Customize these Manage Standing Instructions OmniScript components to suit your business needs.

Assign Permissions for the Manage Standing Instructions Service Process

To use the Manage Standing Instructions service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Manage Standing Instructions service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Manage Standing Instructions service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Manage Standing Instructions service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using theManage Standing Instructions service process.

Deploy the Manage Standing Instructions OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Manage Standing Instructions service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Manage Standing Instructions service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **ManageStandingInstructionsOmniElements** static resource.

   c. Click **View file**.

      ManageStandingInstructionsOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Manage Standing Instructions Service Process Communications

Use your company logo in an Email template and use it with the Manage Standing Instructions service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Manage Standing Instructions-Related Request**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Manage Standing Instructions OmniScript

The Manage Standing Instructions OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.
2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.
3. In the Quick Find Box, search for `FSCServiceProcessShowGetStandingInstructions`, and then select **FSCServiceProcessShowGetStandingInstructions**.
4. Open the highest version of the FlexCard.
5. Preview and load the FlexCard.
6. Similarly, preview and load these FlexCards:

FLEXCARDS
FSCManageStandingInstructionsShowStandingInstructions
FSCManageStandingInstructionsShowNoFinancialAccounts
FSCManageStandingInstructionsShowRequestSummary

Manage Data Attributes and Activate the Manage Standing Instructions Service Process

The Manage Standing Instructions service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Manage Standing Instructions service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.
2. Locate the Manage Standing Instructions service process and from its quick actions menu, click **Edit**.
3. From the navigation pane of the Service Process Definition, select **Data Attributes**.
4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.
5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Manage Standing Instructions Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

Connect to MuleSoft and Enable Integration for Manage Standing Instructions Service Process

To get financial accounts information from a core banking system in the Manage Standing Instructions OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

Associate the Manage Standing Instructions OmniScript to an Action Launcher Deployment

The FSC/ManageStandingInstructions OmniScript guides users in capturing a customer request for adding standing instructions. Agents can launch this OmniScript from the record details page of a person account to capture the details of the standing instructions for setting up recurring and timely payments.

1. Configure an action launcher deployment and add the Manage Standing Instructions OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Manage Standing Instructions OmniScript Components

Customize these Manage Standing Instructions OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Manage Standing Instructions service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Set values	Retrieves the list of states in the United States.	None
SelectAnAccountShowFinancialAccounts	LWC component action	Shows a list of financial accounts associated with a person account.	showFinancialAccounts LWC component
GetLatestData	Integration Procedure action	Retrieves the most recent transactions associated with the financial account.	ManageStandingInstructions_GetRecurringTransactionData Integration Procedure
AddStandingInstructionFrequency	Select properties	Shows the list of payment frequencies. To add a payment frequency, update the Expression value of the UpdateStandingInstructionValidateDateSelection formula property to suit your business needs.	None
UpdateStandingInstructionFrequency	Select properties	Shows the list of payment frequencies. To update a payment frequency, update the Expression value of the	None

Component Name	Component Type	What It Does	What It Calls
		UpdateStandingInstructionValidateDateSelection formula property to suit your business needs.	
CreateCase	Remote action	Creates a case for the Manage Standing Instructions service request.	ManageStandingInstructionsHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Manage Standing Instructions service request.	None

Add a Standing Instruction to an Account

Your service agents can capture and submit a request for adding a standing instruction through the Manage Standing Instructions OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for adding a standing instruction.

2. Select a financial account.

3. To add a standing instruction, select Add standing instruction.

   If you want to update an existing instruction, select **Update standing instruction** and the standing instruction to update. To cancel an existing instruction, select **Cancel standing instruction** and the standing instruction to cancel.

4. Enter the payee details, such as name, currency, amount, routing number, and account number.

5. If you want to add a standing instruction with a specific timeframe, select **Duration**.

   The duration option is suitable for instructions that have a definite start and end date. Use duration when you want the instruction to occur for a certain period and then automatically stop after the end date is reached.

6. If you want to add a standing instruction to set up a recurring payment at definite intervals, but there's no fixed end date, select Installment.

   For example, to pay off a loan in equal monthly installments until the entire loan amount is settled, select the installment option.

7. Review the payee details, amount to transfer, account number, and frequency and submit the request.

   A case is created in Salesforce for adding a standing instruction request.

Manage Beneficiaries Service Process

The Manage Beneficiaries service process allows your customers to add, modify, or delete beneficiaries who receive the benefit of funds from their financial accounts.

Set Up and Configure the Manage Beneficiaries Service Process

Use the Service Process Studio to enable the Manage Beneficiaries service process to give your agents an easy-to-follow process for capturing customer requests to add or modify beneficiaries associated with their accounts.

Submit a Request to Add or Remove a Beneficiary

Your service agents can capture and submit a request for managing beneficiaries through the Manage Beneficiaries OmniScript. A case is then created in Salesforce.

Set Up and Configure the Manage Beneficiaries Service Process

Use the Service Process Studio to enable the Manage Beneficiaries service process to give your agents an easy-to-follow process for capturing customer requests to add or modify beneficiaries associated with their accounts.

Assign Permissions for the Manage Beneficiaries Service Process

To use the Manage Beneficiaries service process, assign relevant permissions to your users.

Deploy the Manage Beneficiaries OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Manage Beneficiaries service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Manage Beneficiaries Service Process Communications

Use your company logo in an Email template and use it with the Manage Beneficiaries service process for customer interactions.

Prepare the Manage Beneficiaries OmniScript

The Manage Beneficiaries OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Manage Beneficiaries Service Process

The Manage Beneficiaries service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Manage Beneficiaries service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Manage Beneficiaries Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Manage Beneficiaries Service Process

To get financial accounts information from a core banking system in the Manage Beneficiaries OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Manage Beneficiaries OmniScript to an Action Launcher Deployment

The FSC/ManageBeneficiaries OmniScript guides users in capturing a customer request for adding or modifying beneficiaries. Agents can launch this OmniScript from the record details page of a person account to capture the details of the beneficiaries.

Manage Beneficiaries OmniScript Components

Customize these Manage Beneficiaries OmniScript components to suit your business needs.

Assign Permissions for the Manage Beneficiaries Service Process

To use the Manage Beneficiaries service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

   a. In Setup, go to **Object Manager**.

   b. Locate each of the objects listed in this task and click **Fields & Relationships**.

   c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Manage Beneficiaries service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Manage Beneficiaries service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Manage Beneficiaries service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

   b. Click the profile that you're editing, and click **Edit**.

   c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

   d. Save your changes.

   e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

   f. Repeat these steps for other profiles that are relevant for using the Manage Beneficiaries service process.

Deploy the Manage Beneficiaries OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Manage Beneficiaries service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Manage Beneficiaries service process.

   a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

   b. Find and select the **ManageBeneficiariesOmniElements** static resource.

   c. Click **View file**.

      ManageBeneficiariesOmniElements.zip file is downloaded.

   d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Manage Beneficiaries Service Process Communications

Use your company logo in an Email template and use it with the Manage Beneficiaries service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Manage Beneficiaries-Related Request**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Manage Beneficiaries OmniScript

The Manage Beneficiaries OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for *FSCManageBeneficiariesShowAddOrDeleteBeneficiaries*, and then select **FSCManageBeneficiariesShowAddOrDeleteBeneficiaries**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load these FlexCards:

FLEXCARDS
FSCManageBeneficiariesShowNoFinancialAccounts
FSCManageBeneficiariesShowAddBeneficiariesHelptext
FSCManageBeneficiariesDisplayBeneficiaries
FSCManageBeneficiariesShowSummary
FSCManageBeneficiarySummaryScriptChildCard
FSCManageBeneficiariesShowDeleteBeneficiaries
FSCManageBeneficiariesShowAddBeneficiaries

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To preview and load FlexCards in the OmniScript
- OmniStudio Admin

Manage Data Attributes and Activate the Manage Beneficiaries Service Process

The Manage Beneficiaries service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Manage Beneficiaries service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Manage Beneficiaries service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To activate the service process definition in Service Process Studio:

- Industry Service Excellence

Update the Page Layouts with Source System ID and Card Number for Manage Beneficiaries Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Connect to MuleSoft and Enable Integration for Manage Beneficiaries Service Process

To get financial accounts information from a core banking system in the Manage Beneficiaries OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Manage Beneficiaries OmniScript to an Action Launcher Deployment

The FSC/ManageBeneficiaries OmniScript guides users in capturing a customer request for adding or modifying beneficiaries. Agents can launch this OmniScript from the record details page of a person account to capture the details of the beneficiaries.

1. Configure an action launcher deployment and add the Manage Beneficiaries OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

Manage Beneficiaries OmniScript Components

Customize these Manage Beneficiaries OmniScript components to suit your business needs.

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Manage Beneficiaries service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	Service_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a person account.	ManageBeneficiaries_GetFinancialAccounts Integration Procedure
GetBeneficiaryList	Integration Procedure action	Retrieves beneficiaries associated with a financial account.	ManageBeneficiaries_GetBeneficiaryList Integration Procedure
RelationshipWithAccountHolder	Select properties	Shows the relationship types for the beneficiary associated with a person account.	None
RelationshipWithBeneficiary	Select properties	Shows the relationship types for the guardians associated with a beneficiary.	None

Component Name	Component Type	What It Does	What It Calls
CreateCase	Remote action	Creates a case for the Manage Beneficiaries service request.	ManageBeneficiariesHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Manage Beneficiaries service request.	None

Submit a Request to Add or Remove a Beneficiary

Your service agents can capture and submit a request for managing beneficiaries through the Manage Beneficiaries OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for managing beneficiaries.

2. Select a financial account to add or remove a beneficiary.

   To add a beneficiary, select the add option. To remove a beneficiary, select the delete option.

3. If you've chosen to add a beneficiary to the account, enter the details of the beneficiary, such as beneficiary name, email, birth data, relationship with the beneficiary and address.

   If the beneficiary is a minor, enter the guardian's details.

4. If you've chosen to remove a beneficiary, select the beneficiaries to remove.

5. Review the beneficiary details and submit the request.

   A case is created in Salesforce for adding or removing a beneficiary request.

Request Loan Payoff Statement Service Process

The Request Loan Payoff Statement service process simplifies the way customers can manage and repay their loans.

Set Up and Configure the Request Loan Payoff Statement Service Process

Use the Service Process Studio to enable the Request Loan Payoff Statement service process to give your agents an easy-to-follow process for capturing customer requests for loan payoff statements.

Submit a Request for Loan Payoff Statement

Your service agents can capture and submit a customer request for obtaining a loan payoff statement through the Request Loan Payoff Statement OmniScript. A case is then created in Salesforce.

Set Up and Configure the Request Loan Payoff Statement Service Process

Use the Service Process Studio to enable the Request Loan Payoff Statement service process to give your agents an easy-to-follow process for capturing customer requests for loan payoff statements.

Assign Permissions for the Request Loan Payoff Statement Service Process

To use the Request Loan Payoff Statement service process, assign relevant permissions to your users.

Deploy the Request Loan Payoff Statement OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Request Loan Payoff Statement service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

Incorporate Your Company Logo in Request Loan Payoff Statement Service Process Communications

Use your company logo in an Email template and use it with the Request Loan Payoff Statement service process for customer interactions.

Prepare the Request Loan Payoff Statement OmniScript

The Request Loan Payoff Statement OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Manage Data Attributes and Activate the Request Loan Payoff Statement Service Process

The Request Loan Payoff Statement service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Request Loan Payoff Statement service process when the data attributes are ready.

Update the Page Layouts with Source System ID and Card Number for Request Loan Payoff Statement Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

Connect to MuleSoft and Enable Integration for Request Loan Payoff Statement Service Process

To get financial accounts information from a core banking system in the Request Loan Payoff Statement OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

Associate the Request Loan Payoff Statement OmniScript to an Action Launcher Deployment

The FSC/RequestLoanPayoffStatement OmniScript guides users in capturing a customer request for a loan payoff statement. Agents can launch this OmniScript from the record details page of a person account to capture the details of the loan payoff statement request.

Request Loan Payoff Statement OmniScript Components

Customize these Request Loan Payoff Statement OmniScript components to suit your business needs.

Assign Permissions for the Request Loan Payoff Statement Service Process

To use the Request Loan Payoff Statement service process, assign relevant permissions to your users.

Before you begin, install the unmanaged package extension for Financial Services Cloud Service Processes for Retail Banking. For more information, see Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes.

1. Update field-level security.

    a. In Setup, go to **Object Manager**.

    b. Locate each of the objects listed in this task and click **Fields & Relationships**.

    c. For each object and field, update the field-level security as shown in this table for all the profiles that use the Request Loan Payoff Statement service process.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the Request Loan Payoff Statement service process, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the Request Loan Payoff Statement service process, select **Visible** and deselect **Read-Only**.

2. Update object permissions.

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

    b. Click the profile that you're editing, and click **Edit**.

    c. Under Standard Object Permissions, locate the **Case** object and assign the **Read**, **Create**, **Edit**, and **View All** permissions.

    d. Save your changes.

    e. Similarly, for the **Service Catalog Requests**, **Service Catalog Item Dependencies**, and **Service Catalog Request Related Items** objects assign Read, Create, Edit, and View All permissions.

    f. Repeat these steps for other profiles that are relevant for using the Request Loan Payoff Statement service process.

Deploy the Request Loan Payoff Statement OmniStudio Elements

Ensure that the essential OmniStudio elements needed for the Request Loan Payoff Statement service process are deployed in your Salesforce org. The OmniStudio elements are available as static resources, which you can download and upload to your org.

1. Download the static resources relevant for the Request Loan Payoff Statement service process.

    a. From Setup, in the Quick Find box, enter `Static Resources`, and then select **Static Resources**.

    b. Find and select the **RequestLoanPayoffOmniElements** static resource.

    c. Click **View file**.

    RequestLoanPayoffOmniElements.zip file is downloaded.

    d. Repeat steps b and c for the **CommonOmniElements** static resource.

2. Deploy the downloaded static resource files in your Salesforce org. You can use your preferred data import tool, for example Salesforce CLI, to deploy these static resource files. For more information about Salesforce CLI, see Salesforce CLI Setup Guide.

Incorporate Your Company Logo in Request Loan Payoff Statement Service Process Communications

Use your company logo in an Email template and use it with the Request Loan Payoff Statement service process for customer interactions.

Before you begin, add your company logo to Salesforce Classic documents and incorporate the logo into an email template. See Add Your Company Logo to an Email Template on page 603.

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

2. In the list view, find and select **Review Loan Payoff Statement Request**.

3. On the upper-left corner of the page, click the Toolbox icon.

4. Before you can update a flow, deactivate it.

5. In the Toolbox pane, under Constants, select **HeaderImageURL**.

6. In the Value field, enter the address of your company's logo that you copied earlier.

7. Save and activate the flow.

Prepare the Request Loan Payoff Statement OmniScript

The Request Loan Payoff Statement OmniScript contains FlexCards that show the account and financial account details of a customer. Preview and load these FlexCards in your Salesforce org before using the OmniScript.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From the App Launcher, find and select **OmniStudio**.

2. In the OmniStudio app, from the navigation bar, select **OmniStudio FlexCards**.

3. In the Quick Find Box, search for `RequestLoanPayoffStatementShowPayoffDetails`, and then select **RequestLoanPayoffStatementShowPayoffDetails**.

4. Open the highest version of the FlexCard.

5. Preview and load the FlexCard.

6. Similarly, preview and load the **FSCRequestLoanPayoffStatementShowNoFinancialAccounts** and **RequestLoanPayoffStatementShowSummary** FlexCards:

Manage Data Attributes and Activate the Request Loan Payoff Statement Service Process

The Request Loan Payoff Statement service process has predefined data attributes. Create more as needed or modify the existing data attributes to meet the needs of your business. Activate the Request Loan Payoff Statement service process when the data attributes are ready.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.
- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**.

2. Locate the Request Loan Payoff Statement service process and from its quick actions menu, click **Edit**.

3. From the navigation pane of the Service Process Definition, select **Data Attributes**.

4. Create data attributes or modify the existing data attributes to suit your business needs. For more information, see Data Attributes.

5. If you added or modified any data attributes, save your changes.

6. Activate the service process definition.

Update the Page Layouts with Source System ID and Card Number for Request Loan Payoff Statement Service Process

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to the Card page layout. The Source System ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

1. Update the page layouts with Source System ID and Card Number fields. See Customize the Page Layouts with Source System ID and Card Number on page 604.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Connect to MuleSoft and Enable Integration for Request Loan Payoff Statement Service Process

To get financial accounts information from a core banking system in the Request Loan Payoff Statement OmniScript, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

1. Connect your Salesforce and MuleSoft instances and enable integration. See Connect to MuleSoft and Enable Integration.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Add the Case Details Lightning Component to the Case Record Page

To show your agents all the data attributes associated with a service process request for a case, add the Case Details Lightning component to the case record page.

1. Add the Case Details Lightning Component. See Add the Case Details Lightning Component to the Case Record Page.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Associate the Request Loan Payoff Statement OmniScript to an Action Launcher Deployment

The FSC/RequestLoanPayoffStatement OmniScript guides users in capturing a customer request for a loan payoff statement. Agents can launch this OmniScript from the record details page of a person account to capture the details of the loan payoff statement request.

1. Configure an action launcher deployment and add the Request Loan Payoff Statement OmniScript to the record details page of a person account. See Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Request Loan Payoff Statement OmniScript Components

Customize these Request Loan Payoff Statement OmniScript componentsto suit your business needs.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Component Name	Component Type	What It Does	What It Calls
SetServiceProcessAccountContext	Integration Procedure action	Retrieves the user's Account Id from Salesforce when the user logs in to a self-service portal and launches the Request Loan Payoff Statement service process. It also retrieves the portal's URL extension and stores it in the CommunityBasePath variable.	SelfService_SetServiceProcessAccountContext Integration Procedure
FSC_ServiceProcessGetAccountDetails	DataRaptor extract action	Retrieves the user's account details.	FSCServiceProcessGetAccountDetails DataRaptor
GetFinancialAccounts	Integration Procedure action	Retrieves financial accounts associated with a person account.	RequestLoanPayoffStatement_GetFinancialAccounts
GetAccountsAddress	Integration Procedure action	Retrieves addresses associated with a person account.	RequestLoanPayoffStatement_GetFindAcctAddresses Integration Procedure
GetLoanPayoffDetails	Integration Procedure action	Retrieves the loan payoff details associated with the financial account.	RequestLoanPayoffStatement_GetLoanPayoffDetails Integration Procedure
CreateAttachment	PDF action	Creates a PDF document of the requested loan payoff statement.	None
CreateCase	Remote action	Creates a case for the Request Loan Payoff Statement service request.	RequestLoanPayoffStatementHelperFunctions class and callCreateCaseApi method
SetCaseConfirmationDetails	Set values	Sets the case URL and confirmation message for the submitted Request Loan Payoff Statement service request.	None

Submit a Request for Loan Payoff Statement

Your service agents can capture and submit a customer request for obtaining a loan payoff statement through the Request Loan Payoff Statement OmniScript. A case is then created in Salesforce.

1. On the customer's person account record page, in the action launcher, select the action for requesting a loan payoff statement.

2. Select a loan account and the loan payoff date.

3. Review the loan details, such as Principal, Interest, Fee, Penalty, and the Total Payoff Amount.

4. Select the mode of delivery to send the loan payoff statement.

5. If you've selected the mode of delivery as Post, select a shipping method and a shipping address.

6. Review the loan payoff statement details and submit the request.

   A case is created in Salesforce for the submitted loan payoff statement request.

Add Your Company Logo to an Email Template

Add your company logo to Salesforce Classic documents and incorporate the logo into an email template. You can later use the email template with retail banking service processes for customer interactions.

1. Upload your company logo to the Documents tab.

   a. In the upper-right corner, click your profile name and select **Switch to Salesforce Classic**.

   b. Go to the Documents tab.

   If you don't see the Documents tab in the menu bar, click **+** and select it from the list.

   c. Under Recent Documents, click **New**.

   d. Enter a document name, select **Externally Available Image**, and select a folder where you want to store the image file

   e. Select **Choose File** and navigate to the image file to import.

   f. Save your changes.

2. Copy the image address.

   a. In the Documents tab, click the image file that you uploaded.

   b. Right-click on the image and select **Copy Image Address**.

3. Add the copied image address to the email template.

   a. Switch to Lightning Experience.

   b. From Setup, in the Quick Find box, enter `Classic Email Template`, and then select **Classic Email Templates**.

   c. Click **Case Closure Email Template**.

   d. Click **Edit HTML Version**.

   e. Under HTML Email Content, in the HTML Body, add the copied image address in the <img src> tag.

4. To use an email address for customer interactions, add an organization-wide email address. See Set Up Organization-Wide Email Addresses.

Customize the Page Layouts with Source System ID and Card Number

Add the Source System ID field to the Financial Account, Card, and Financial Account Role page layouts, and the Card Name field to Card page layouts. The Source ID field shows the ID of the record in the core banking system. The ID determines which account to pull data from in the core banking system.

The Financial Services Cloud managed package must be installed in Salesforce before you can complete these steps.

1. Update the page layouts.

   a. In Setup, go to **Object Manager**.

   b. In the Quick Find box, enter `Card`, then select **Card**.

   c. In Page Layouts, click **Card Layout**.

   d. Drag the Source System ID and the Card Name fields to the Information pane.

   e. Save your changes.

   f. Complete steps b through f for other Card page layouts.

   g. Similarly, add the Source System ID field to the Financial Account and Financial Account Role page layouts.

2. Update the Source System ID field.

   a. From the App Launcher, find and select **Financial Accounts**.

   b. Update the Source System ID field for the financial accounts with your core banking system ID.

   c. Similarly, update the Source system ID field for the cards and financial account roles with your core banking system ID.

Connect to MuleSoft and Enable Integration

To get financial accounts information from a core banking system, connect your Salesforce and MuleSoft instances and enable integration between Salesforce and the core banking system.

Before you connect to MuleSoft and enable integration, turn on the setting to retrieve real-time financial account and transaction information from your external core banking system. When this setting is off, account information is retrieved from Salesforce. For more information, see Enable Real-Time Financial Account Information.

1. Connect your Salesforce and MuleSoft instances.

   a. From Setup, in the Quick Find box, enter `Integrations Setup`, and then select **Integrations Setup**.

   b. In Financial Services Cloud Integrations, click **I accept the terms and conditions**.

   c. Turn on **Financial Services Cloud Integrations**.

   d. Click **Connect to MuleSoft Instance**.

   e. Select a service and click **Next**.

   f. Enter your MuleSoft username and password and sign in.

   g. Grant access to your MuleSoft account.

   It takes a few minutes for Salesforce to connect to MuleSoft.

   Your Salesforce and MuleSoft instances are now connected. You can view connection details and available integrations.

2. Enable Integration between Salesforce and the core banking system.

   a. On the Integrations Setup page, in the Available Integrations area, from the list of available integrations, go to the integration to enable, and then click **Enable**.

   b. Select a business group for which you want to enable the integration.

   c. Select the environment where you want to enable the integration.

   d. Enter the app name.

      Ensure that the app name is unique for your MuleSoft instance.

   e. Click **Next**.

   f. To connect to the core banking system, select the authentication protocol for the integration and its dependent apps, and then enter the relevant details.

   g. Enable the integration and wait for the process to complete.
      A named credential is created for the enabled integration.

   h. From Setup, in the Quick Find box, enter `Named Credential`, and then select **Named Credential**.

   i. Verify that a named credential was added for the connected MuleSoft instance.

   j. From the quick actions menu of the named credential, select **Edit**.

   k. For Label, enter `FSC_fsc_integrations_V1_0_0`.

   l. Save your changes.

Associate the Retail Banking Service Process OmniScripts to an Action Launcher Deployment

The OmniScript for each service process guides users in capturing a customer service request. Agents can launch these OmniScripts from the record details page of a person account to capture a service request.

Before you begin:

- Enable the OmniStudio Metadata setting. See Enable OmniStudio Metadata API Support.

- Disable the OmniStudio Managed Package Runtime setting. See Disable Managed Package Runtime.

1. Configure an Action Launcher deployment for the OmniScripts.

   Give your users quick access to the intake forms or OmniScripts. If you have an existing Action Launcher deployment, add the intake forms to it.

   a. From Setup, in the Quick Find box, enter `Action Launcher`, and select **Action Launcher**.

   b. Click **New Deployment** and give it a name.

   c. In Guidance to Show, select **OmniScripts**.

   d. In the Available Objects list, move **Account** to Selected Objects.
      The selected objects determine the objects where you can show the OmniScripts.

   e. In Select actions to add, select the OmniScripts or intake forms of these service processes.

SERVICE PROCESS	OMNISCRIPT
Notify Travel Plans	/FSC/NotifyTravelPlans/English

SERVICE PROCESS	OMNISCRIPT
Update Email or Phone	/FSC/UpdateEmailorPhone/English
Order Checkbook	/FSC/OrderCheckbook/English
Stop Check Payment	/FSC/StopCheckPayment/English
Report and Replace Cards	/FSC/ReportandReplaceCards/English
Manage Standing Instructions	/FSC/ManageStandingInstructions/English
Request Statement Copies	/FSC/RequestStatementCopies/English
Transfer Funds to Own Account	/FSC/TransferFundstoOwnAccount/English
Manage Beneficiaries	/FSC/ManageBeneficiaries/English
Request Loan Payoff Statement	/FSC/RequestLoanPayoffStatement/English

    f. Next to each OmniScript that you've selected, click the add icon.

    g. Save your changes.

2. Add the OmniScripts to the Person Account page.

    a. In Setup, go to Object Manager.

    b. In the Quick Find box, enter `Account`, and then select **Account**.

    c. Click **Lightning Record Pages** and select **Account Record Page**.

    d. Click **Edit**.

    e. In the Lightning App Builder, drag the **Action Launcher** component onto the record page.

    f. In the properties pane, select the Action Launcher deployment that contains the OmniScripts of the retail banking service processes.

    g. Save your changes.

Self-Service for Retail Banking Service Processes

Let your customer community users initiate service processes directly from a self-service portal, such as the Financial Services Client Portal. When you make the service processes available with a self-service portal, you allow your customers to raise service process requests at any time, from anywhere.

Address Update as a Self-Service Process

Capture customer requests for address updates through a self-service channel.

Fee Reversal as a Self-Service Process

Capture customer requests to reverse fees charged on their accounts through a self-service channel.

Transaction Dispute Management as a Self-Service Process

Capture customer requests for transaction disputes through a self-service channel.

Notify Travel Plans as a Self-Service Process

Capture customer requests for travel notifications through a self-service channel.

Update Email or Phone as a Self-Service Process

Capture customer requests for email or phone updates through a self-service channel.

Stop Check Payment as a Self-Service Process

Capture customer requests for stop check payments through a self-service channel.

Report and Replace Cards as a Self-Service Process

Capture customer requests to report stolen cards through a self-service channel.

Order Checkbook as a Self-Service Process

Capture customer requests for new checkbooks through a self-service channel.

Request Statement Copies as a Self-Service Process

Capture customer requests for statement copies through a self-service channel.

Transfer Funds to Own Account as a Self-Service Process

Capture customer requests to transfer funds through a self-service channel.

Manage Standing Instructions as a Self-Service Process

Capture customer requests to add or modify standing instructions for their accounts through a self-service channel.

Manage Beneficiaries as a Self-Service Process

Capture customer requests to add or modify beneficiaries through a self-service channel.

Request Loan Payoff Statement as a Self-Service Process

Capture customer requests for loan payoff statements through a self-service channel.

Configure Self-Service for Retail Banking Service Processes

Configure the pre-built retail banking service processes for self-service so that customer community users can initiate the service processes directly from a self-service portal, such as the Financial Services Client Portal.

Create a Customer Community User Profile

To control access to the Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

Assign Permissions Sets to Portal Users

Create and assign permission sets to your portal users to grant the license and permissions they need to access the Financial Services Client Portal and the pre-built retail banking service processes.

Configure the Financial Services Client Portal

Create an experience site using the Financial Services Client Portal template to give your customers access to the pre-built retail banking service processes.

Create Portal Users

Create portal users to access the Financial Service Client Portal.

Configure Field-Level Security

Give your portal users access to the appropriate fields that they need for using the retail banking service processes on the Financial Services Client Portal.

Specify Object-Level Permissions

Grant your portal users the needed object permissions to create service requests for retail banking service processes in the Financial Services Client Portal.

Create a sharing set to give your Financial Services Client Portal users access to records that are relevant for using the retail banking service processes. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

Use sharing rules to extend sharing access to your portal users. Sharing rules give portal users greater access by making automatic exceptions to your org-wide sharing settings. Add sharing rules to give your portal users access to relevant records that they need when submitting service process requests.

Show the actions to launch the pre-built retail banking service processes on the Financial Services Client Portal so that your customer community users can easily create service requests without contacting your service agents.

Address Update as a Self-Service Process

Capture customer requests for address updates through a self-service channel.

Let your customer community users update their addresses on a Financial Services Client Portal.

Complete the address update request form to update addresses in your accounts or financial accounts.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: Professional, Enterprise, and Unlimited Editions where Financial Services Cloud is enabled

Set Up Address Update Service Process on Financial Services Client Portal

Let your customer community users update their addresses on a Financial Services Client Portal.

1. Configure the Address Update service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

> **EDITIONS**
>
> Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

Submit an Address Update Request

Complete the address update request form to update addresses in your accounts or financial accounts.

1. Log in to the Financial Services Client Portal.

2. Find and select the address update page or action on the portal.

3. Complete the request form with your new address, and click **Next**.

4. Select the records to update with the new address, and click **Next**.

   ✎ Note: Only the accounts and financial accounts for which the community user is a primary owner are shown.

5. Select a document type and click **Upload Files**.

   To validate your identity, you must provide a copy of the valid document type that contains the new address.

6. Review the address change details, and click **Submit**.
   The address change request is successfully submitted. A case is created and assigned to a manager for approval. To view the case details, go to the Cases page on the portal.

Fee Reversal as a Self-Service Process

Capture customer requests to reverse fees charged on their accounts through a self-service channel.

Set Up Fee Reversal Service Process on Financial Services Client Portal
Let your customer community users request a fee reversal on a Financial Services Client Portal.

Submit a Fee Reversal Request
Complete the fee reversal request form to reverse a fee for your financial account.

Set Up Fee Reversal Service Process on Financial Services Client Portal

Let your customer community users request a fee reversal on a Financial Services Client Portal.

1. Configure the Fee Reversal service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Submit a Fee Reversal Request

Complete the fee reversal request form to reverse a fee for your financial account.

1. Log in to the Financial Services Client Portal.

2. Find and select the fee reversal page or action on the portal.

3. Select a financial account, and click **Next**.

   You can select only one financial account per fee reversal request. Only checking, saving, and credit card type financial accounts are shown.

   ✏️ Note: Only the financial accounts for which the community user is a primary owner are shown.

4. To view a list of transactions, select a fee type, and click **Next**.

5. Select a transaction, and click **Next**.

6. Review the fee reversal summary, and then click **Create a Case**.

   The fee reversal request is successfully submitted. A case is created and assigned to a manager for approval. To view the case details, go to the Cases page on the portal.

Transaction Dispute Management as a Self-Service Process

Capture customer requests for transaction disputes through a self-service channel.

Set Up Transaction Dispute Management as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to raise disputes related to their financial transactions.

Set Up Transaction Dispute Management as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to raise disputes related to their financial transactions.

Before you begin, ensure you've set up the Transaction Dispute Management service process. See Set Up Transaction Dispute Management.

1. Configure the Transaction Dispute Management service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

2. Assign user permissions to access Named Credentials and External Credentials needed for secured access to transaction enrichment providers.

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

   b. Edit the cloned community user profile.

   c. Scroll down to locate the **Administrative Permissions** section and then select **Allows users to modify Named Credentials and External Credentials**.

   d. Save your changes.

Notify Travel Plans as a Self-Service Process

Capture customer requests for travel notifications through a self-service channel.

Set Up Notify Travel Plans as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to provide notice about their travel plans.

Set Up Notify Travel Plans as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to provide notice about their travel plans.

1. Configure the Notify Travel Plans service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Update Email or Phone as a Self-Service Process

Capture customer requests for email or phone updates through a self-service channel.

Set Up Update Email or Phone as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to request for email or phone update.

Set Up Update Email or Phone as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to request for email or phone update.

1. Configure the Update Email or Phone service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Stop Check Payment as a Self-Service Process

Capture customer requests for stop check payments through a self-service channel.

Set Up Stop Check Payment as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to stop check payments.

Set Up Stop Check Payment as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to stop check payments.

1. Configure the Stop Check Payment service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Report and Replace Cards as a Self-Service Process

Capture customer requests to report stolen cards through a self-service channel.

Set Up Report and Replace Cards as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to report stolen cards, block cards, and request replacement cards.

Set Up Report and Replace Cards as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to report stolen cards, block cards, and request replacement cards.

1. Configure the Report and Replace Cards service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Order Checkbook as a Self-Service Process

Capture customer requests for new checkbooks through a self-service channel.

Set Up Order Checkbook as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to order new checkbooks.

Set Up Order Checkbook as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to order new checkbooks.

1. Configure the Order Checkbook service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Request Statement Copies as a Self-Service Process

Capture customer requests for statement copies through a self-service channel.

Set Up Request Statement Copies as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template and give your customers a self-guided process to request statement copies of their accounts.

Set Up Request Statement Copies as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template and give your customers a self-guided process to request statement copies of their accounts.

1. Configure the Request Statement Copies service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Transfer Funds to Own Account as a Self-Service Process

Capture customer requests to transfer funds through a self-service channel.

Set Up Transfer Funds to Own Account as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to transfer funds to their accounts.

Set Up Transfer Funds to Own Account as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to transfer funds to their accounts.

1. Configure the Transfer Funds to Own Account service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Manage Standing Instructions as a Self-Service Process

Capture customer requests to add or modify standing instructions for their accounts through a self-service channel.

Set Up Manage Standing Instructions as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to add standing instructions to their accounts.

Set Up Manage Standing Instructions as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to add standing instructions to their accounts.

1. Configure the Manage Standing Instructions service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Manage Beneficiaries as a Self-Service Process

Capture customer requests to add or modify beneficiaries through a self-service channel.

Set Up Manage Beneficiaries as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to add or modify beneficiaries.

Set Up Manage Beneficiaries as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to add or modify beneficiaries.

1. Configure the Manage Beneficiaries service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Request Loan Payoff Statement as a Self-Service Process

Capture customer requests for loan payoff statements through a self-service channel.

Set Up Request Loan Payoff Statement as a Self-Service Process
Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to request for a loan payoff statement.

Set Up Request Loan Payoff Statement as a Self-Service Process

Configure a self-service portal using the Financial Services Client Portal template to give your customers a self-guided process to request for a loan payoff statement.

1. Configure the Request Loan Payoff Statement service process for self-service on the Financial Services Client Portal. Complete all the steps in Configure Self-Service for Retail Banking Service Processes on page 615.

Configure Self-Service for Retail Banking Service Processes

Configure the pre-built retail banking service processes for self-service so that customer community users can initiate the service processes directly from a self-service portal, such as the Financial Services Client Portal.

1. Create a Customer Community User Profile. See Create a Customer Community User Profile.

2. Assign Permissions Sets to Portal Users. See Assign Permissions Sets to Portal Users.

3. Configure the Financial Services Client Portal. See Configure the Financial Services Client Portal.

4. Create Portal Users. See Create Portal Users.

5. Configure Field-Level Security. See Configure Field-Level Security.

6. Specify Object-Level Permissions. See Specify Object-Level Permissions.

7. Set Up Sharing Sets. See Set Up Sharing Sets.

8. Set Up Sharing Rules. See Set Up Sharing Rules.

9. Make the Retail Banking Service Processes Visible to Your Portal Users. See Make the Retail Banking Service Processes Visible to Your Portal Users.

Create a Customer Community User Profile

To control access to the Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

SEE ALSO:

Create a Customer Community User Profile

Assign Permissions Sets to Portal Users

Create and assign permission sets to your portal users to grant the license and permissions they need to access the Financial Services Client Portal and the pre-built retail banking service processes.

1. Create and assign permission sets to portal users to grant the permissions they need to access the Financial Services Client Portal. See Assign a Permission Set to Portal Users.

2. Create an OmniStudio permission set for your portal users. See Create an OmniStudio Permission Set for Standard Experience Users.

3. Assign the OmniStudio permissions set to your portal users. See Assign the OmniStudio Permission Set or Group to Standard Experience Site Users.

SEE ALSO:

Setup OmniStudio Permission Sets for Experience Cloud Site Users

Configure the Financial Services Client Portal

Create an experience site using the Financial Services Client Portal template to give your customers access to the pre-built retail banking service processes.

SEE ALSO:

Configure the Financial Services Client Portal

Create Portal Users

Create portal users to access the Financial Service Client Portal.

SEE ALSO:

Create Portal Users

Configure Field-Level Security

Give your portal users access to the appropriate fields that they need for using the retail banking service processes on the Financial Services Client Portal.

1. In Setup, go to **Object Manager**.

2. Locate each of the objects listed in this task and click **Fields & Relationships**.

3. For each object and field, update the field-level security as shown in this table for all the profiles that use the retail banking service processes.

OBJECT	FIELD	FIELD-LEVEL SECURITY
Case	Account Name	For the profiles using the retail banking service processes, select **Visible** and deselect **Read-Only**.
	Case Source	
	Financial Account	
Card	Card Number	For the profiles using the retail banking service processes, select **Visible** and deselect **Read-Only**.

Specify Object-Level Permissions

Grant your portal users the needed object permissions to create service requests for retail banking service processes in the Financial Services Client Portal.

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

2. Edit the cloned community user profile.

3. Configure these object permissions.

OBJECT	ACCESS LEVEL
Accounts	Read
Cases	Read, Edit, and Create
Service Catalog Requests	Read, Edit, and Create
Financial Accounts	Read
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni UI Cards	Read

OBJECT	ACCESS LEVEL
Document Checklist Items	Read, Edit, and Create
Decision Matrices	Read (Required only for Address Update service process)
Expression Sets	Read (Required only for Address Update service process)

Set Up Sharing Sets

Create a sharing set to give your Financial Services Client Portal users access to records that are relevant for using the retail banking service processes. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Settings**.

2. In the Sharing Sets related list, click **New**.

3. Enter a label for the sharing set.

4. In the Select Profiles section, select your cloned community user profile and click **Add**.

5. Under Select Objects, select **Account-Account Relationship**, **Case**, **Financial Account**, and **User**, and then click **Add**.

   📝 Note: Configuring the access for the Financial Account Transaction object in the sharing set is required only for those service processes, which need access to customer's financial transaction details. For example, the Fee Reversal service process.

6. In the Configure Access section, next to each object, click **Set Up** and configure access for the objects as shown in this table.

OBJECT	ACCESS DETERMINED BY	ACCESS LEVEL
Account-Account Relationship	User:Account = Account-Account Relationship:Owner.Account	Read Only
Case	User:Account = Case:Owner.Account	Read/Write
Dispute	User:Account = Dispute:Case.Account	Read/Write
Financial Account	User:Contact.Account = Financial Account:FinServ__PrimaryOwner__c	Read Only
Financial Account Transaction	User:Account = Financial Account Transaction:FinServ__FinancialAccount__c:FinServ__PrimaryOwner__c	Read Only
Service Catalog Request	User:Account = Service Catalog Request:Case.Account	Read Only
User	User:Account = User:Account	Read Only

7. Save your changes.

> **Note:** When a customer community user initiates the service processes from the Financial Services Client Portal, only the financial accounts for which the user is a primary owner are shown.

SEE ALSO:

Set Up Sharing Rules

Use sharing rules to extend sharing access to your portal users. Sharing rules give portal users greater access by making automatic exceptions to your org-wide sharing settings. Add sharing rules to give your portal users access to relevant records that they need when submitting service process requests.

1. To let your portal users access the OmniScripts of all the retail banking service processes, set up sharing rules for the Omni Process object.

   a. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

   b. Under Sharing Rules, next to Omni Process Sharing Rules, click **New**.

   c. Enter the label name and rule name.

   d. For the rule type, select **Based on Criteria** to specify the field, operator, and value criteria that records must match to be included in the sharing rule.

   e. For Field, select **Type**, for Operator, select **Equals**, and for Value, enter `FSC`.

   f. For Share with, select **Public Groups** from the first dropdown list and **All Customer Portal Users** from the second dropdown list.

   g. For Access Level, select **Read Only**.

   h. Save your changes.

2. To show a list of valid document types that portal users can select when submitting a service process request, set up sharing rules for the Decision Matrix object.

   > **Note:** Setting up a sharing rule for the Decision matrix object is required only for the Address Update service process.

   a. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

   b. Under Sharing Rules, next to Decision Matrix Sharing Rules, click **New**.

   c. Enter the label name and rule name.

   d. For the rule type, select **Based on Criteria** to specify the field, operator, and value criteria that records must match to be included in the sharing rule.

   e. For Field, select **Unique Name**, for Operator, select **Equals**, and for Value, enter `GetAllRequiredDocumentTypes`.

   f. For Share with, select **Public Groups** from the first dropdown list and **All Customer Portal Users** from the second dropdown list.

   g. For Access Level, select **Read Only**.

   h. Save your changes.

3. To let your portal users read the values in the decision matrix and populate the document type values, set up sharing rules for the Expression Set object.

> **Note:** Setting up a sharing rule for the Expression Set object is required only for the Address Update service process.

   a. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.

   b. Under Sharing Rules, next to Expression Set Sharing Rules, click **New**.

   c. Enter the label name and rule name.

   d. For the rule type, select **Based on Criteria** to specify the field, operator, and value criteria that records must match to be included in the sharing rule.

   e. For Field, select **Unique Name**, for Operator, select **Equals**, and for Value, enter `GetAllDocumentTypes`.

   f. For Share with, select **Public Groups** from the first dropdown list and **All Customer Portal Users** from the second dropdown list.

   g. For Access Level, select **Read Only**.

   h. Save your changes.

SEE ALSO:

   Create Criteria-Based Sharing Rules

Make the Retail Banking Service Processes Visible to Your Portal Users

Show the actions to launch the pre-built retail banking service processes on the Financial Services Client Portal so that your customer community users can easily create service requests without contacting your service agents.

Before you begin:

- Ensure you've configured the needed pre-built retail banking service processes in Salesforce.
- Ensure you've added the URL path name of your Experience Cloud portal in the Service Requests component to give your portal users access to view the details of their service requests. For more information, see Update the URL Path Name.

1. Create an Action Launcher deployment to add the OmniScripts or intake forms of these service processes. See Create an Action Launcher Deployment.

SERVICE PROCESS	OMNISCRIPT
Address Update	/FSCAddressUpdate/CreateRequest/English
Fee Reversal	/FSC/FeeReversal/English
Transaction Dispute Management	/FSC/TransactionDisputeManagement/English
Notify Travel Plans	/FSC/NotifyTravelPlans/English
Update Email or Phone	/FSC/UpdateEmailorPhone/English
Order Checkbook	/FSC/OrderCheckbook/English
Stop Check Payment	/FSC/StopCheckPayment/English
Report and Replace Cards	/FSC/ReportandReplaceCards/English
Manage Standing Instructions	/FSC/ManageStandingInstructions/English

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled

USER PERMISSIONS

To customize and publish a Financial Services Client Portal:

- Be a member of the portal AND Create and Set Up Experiences

  OR

  Be a member of the portal AND an experience admin or publisher in that portal

SERVICE PROCESS	OMNISCRIPT
Request Statement Copies	/FSC/RequestStatementCopies/English
Transfer Funds to Own Account	/FSC/TransferFundstoOwnAccount/English
Manage Beneficiaries	/FSC/ManageBeneficiaries/English
Request Loan Payoff Statement	/FSC/RequestLoanPayoffStatement/English

2. From Setup, in the Quick Find box, enter **Digital Experiences**, and then select **All Sites**.

3. Next to your Experience Cloud portal, click **Builder**.

4. Click **Action Launcher**.

5. Select the deployment you created earlier.

6. Preview and publish your changes.

SEE ALSO:

Self-Service Capabilities in Financial Services Client Portal

Give your clients the ability to manage their financial services needs through a self-service portal. Set up a new Experience Cloud portal using the Financial Services Client Portal template and configure the self-service capabilities. Clients can create and track service requests, schedule and manage appointments, submit loan applications, browse frequently asked questions and knowledge articles, and provide feedback. You can use the Experience Cloud portal as is or you can embed this portal into existing internet and mobile banking systems through single sign-on.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

Create a Customer Community User Profile

To control access to the Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

Assign a Permission Set to Portal Users

Create and assign a permission set for portal users to grant the license and permissions they need to access the Financial Services Client Portal.

Configure the Financial Services Client Portal

Create an experience site using the Financial Services Client Portal template to give your customers access to the self-service capabilities.

Create Portal Users

Create portal users to access the Financial Service Client Portal.

Grant your portal users the needed user and object permissions to create service requests, schedule appointments, submit surveys, browse knowledge articles, and submit loan applications in the Financial Services Client Portal.

Use the Experience Builder components and workspaces in the Financial Services Client Portal to set up the self-service capabilities.

SEE ALSO:

Create a Customer Community User Profile

To control access to the Financial Services Cloud features, create a profile for portal users with the appropriate permissions by cloning a community user profile.

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

2. Next to the user profile that maps to your customer community license, click **Clone**.

   If your community license is Customer Community, then select either Customer Community User or Customer Community Login User as the user profile. If your community license is Customer Community Plus, select either Customer Community Plus User or Customer Community Plus Login User as the user profile.

3. Enter a name for the cloned profile, for example `Banking Customer Community User`, and then save your changes.

   This cloned profile becomes the baseline that grants your portal users access to Financial Services Cloud features.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

USER PERMISSIONS

To create profiles:
- Manage Profiles and Permission Sets

Assign a Permission Set to Portal Users

Create and assign a permission set for portal users to grant the license and permissions they need to access the Financial Services Client Portal.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

2. Click **New**.

3. Provide a name for the permission set, for example `Customer Access`.

4. For License, select **Financial Services for Customer Community**, and then save your changes.

5. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.

6. Click a user who's assigned one of the customer community profiles.

7. In Permission Set Assignments, click **Edit Assignments**.

8. From Available Permission Sets, select the permission set that you created and an appropriate user profile permission set.

   For example, if the customer user profile is Customer Community, select Financial Services For Customer Community as the user profile permission set.

9. Click **Add**.

10. Save your changes.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign permission sets:
- Assign Permission Sets

Configure the Financial Services Client Portal

Create an experience site using the Financial Services Client Portal template to give your customers access to the self-service capabilities.

Before you can create a Financial Services Client Portal, enable Digital Experiences in Salesforce.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.

2. Click **New**, and select the Financial Services Client Portal template.

3. Click **Get Started**.

4. Enter a site name.

5. For the URL, enter the name of your site.

   This name is appended to the domain that you created when you enabled Digital Experiences. For example, if your site's domain name is `fscna45.my.site.com` and you're creating a bank site, you can enter `MyBank` to create the URL `fscna45.my.site.com/MyBank`.

6. Click **Create**.

7. Click **Administration**, and then under Settings, click **Activate**.

8. Under Members, from the Search dropdown, select **Customer**.

9. From Available Profiles, select your cloned community user profile, and then click **Add**.

10. Save your changes.

SEE ALSO:

    Enable Digital Experiences

    Create an Experience Cloud Site

    Create a Self-Service Financial Services Client Portal

    Add Members to Your Experience Cloud Site

    Create Experience Cloud Site Users

Create Portal Users

Create portal users to access the Financial Service Client Portal.

SEE ALSO:

    Create Experience Cloud Site Users

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

USER PERMISSIONS

To create a Financial Services Client Portal:
- Create and Set Up Experiences AND View Setup and Configuration

To customize a Financial Services Client Portal:
- Be a member of the portal AND Create and Set Up Experiences

  OR

  Be a member of the portal AND View Setup and Configuration AND an Experience Cloud admin, publisher, or builder in that portal

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

Grant Portal Users Required User and Object Permissions

Grant your portal users the needed user and object permissions to create service requests, schedule appointments, submit surveys, browse knowledge articles, and submit loan applications in the Financial Services Client Portal.

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

2. Edit the cloned community user profile.

3. Under General User Permissions, enable **Run Flows**.

    This permission enables your portal users to run Salesforce Scheduler flow for scheduling appointments in the Financial Services Client Portal.

4. Configure these object permissions.

OBJECT LEVEL	ACCESS LEVEL
Accounts	Read
Appointment Categories	Read
Appointment Topic Time Slots	Read
Cases	Read, Edit, and Create
Contacts	Read
Decision Matrices	Read
Document Checklist Items	Read, Edit, and Create
Engagement Channel Type	Read
Expression Sets	Read
Financial Accounts	Read
Loan Application Properties	Read
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni UI Cards	Read
Operating Hours	Read
Residential Loan Applications	Read, Edit, and Create
Service Appointments	Read, Edit, and Create
Service Catalog Requests	Read, Edit, and Create
Service Resources	Read

OBJECT LEVEL	ACCESS LEVEL
Service Territories	Read
Shifts	Read
Survey Invitations	Read
Survey Responses	Read, Edit, and Create
Surveys	Read
Work Types	Read
Work Type Groups	Read

5. Save your changes.

6. Update field-level security for the Case Source field on the Case object.

   a. In Setup, go to **Object Manager**.

   b. In the Quick Find box, enter `Case`, and select **Case**.

   c. Select **Fields & Relationships**.

   d. Select **Case Source**.

   e. Click **Set Field-Level Security**.

   f. For the cloned community user profile, select **Visible** and deselect **Read-Only**.

   g. Save your changes.

Configure the Self-Service Capabilities

Use the Experience Builder components and workspaces in the Financial Services Client Portal to set up the self-service capabilities.

Add Service Processes

Deploy pre-configured service processes in the portal's action launcher component to let your users easily create service requests.

Service Request Management

Configure the Service Requests component to let your portal users view and track their existing service requests. Your portal users can search for a service process in the action launcher and create a service request.

Appointment Management

Give your portal users a personalized experience in scheduling appointments. Configure the My Appointments component in the Experience Builder to provide your portal users with options for scheduling in-person, phone, or video appointments. Portal users can see their upcoming and past appointments, and cancel scheduled appointments.

Knowledge Management

Give your portal users access to browse knowledge articles and frequently asked questions. Add these knowledge sources to the portal's Knowledge Center component to help your portal users make informed decisions, resolve common issues independently, and expand their understanding of various financial services.

Understand customer feedback as it evolves and engage customers with relevant, personalized surveys. Configure the Survey component in the Experience Cloud portal and link surveys to it to collect data from your customers.

Configure Permissions for Residential Loan Applications

Give your portal users the necessary permissions to submit a residential loan application and upload required documents.

Configure User Permissions to Ask a Question

Give your portal users the necessary permissions to post a question about a topic and start a discussion in the Financial Services Client portal. Your portal users can use the Ask a Question feature on the portal to post questions.

Add Service Processes

Deploy pre-configured service processes in the portal's action launcher component to let your users easily create service requests.

Before you can add the service processes, ensure you've configured the needed pre-built service processes in Salesforce.

1. Create an action launcher deployment to add the OmniScripts or intake forms of the service processes. For example, to add Address Update and Fee Reversal service processes to the portal's action launcher, add the **/FSCAddressUpdate/CreateRequest/English** and **/FSC/FeeReversal/English** OmniScripts in your deployment.

2. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

3. Next to your Experience Cloud portal, click **Builder**.

4. Click **Action Launcher**.

5. Select the deployment you created earlier.

6. Preview and publish your changes.

SEE ALSO:

Streamline Updating Client Addresses Using Service Process Studio

Set Up Address Update Service Process on Financial Services Client Portal

Reverse Fees on Client Accounts Using Service Process Studio

Set Up Fee Reversal Service Process on Financial Services Client Portal

Create an Action Launcher Deployment

Create an OmniStudio Permission Set for Standard Experience Users

Assign the OmniStudio Permission Set or Group to Standard Experience Site Users

Create an OmniStudio Profile for Standard Experience Cloud Site Users

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

USER PERMISSIONS

To customize a Financial Services Client Portal:
- Be a member of the portal AND Create and Set Up Experiences

  OR

  Be a member of the portal AND View Setup and Configuration AND an Experience Cloud admin, publisher, or builder in that portal

Service Request Management

Configure the Service Requests component to let your portal users view and track their existing service requests. Your portal users can search for a service process in the action launcher and create a service request.

Set Up a Sharing Set for Service Catalog Request Records

Give your portal users access to the Service Catalog Request records using a sharing set. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

Update the URL Path Name

Add the URL Path Name of your Experience Cloud portal in the Service Requests component to give your portal users access to view the details of their service requests.

Set Up a Sharing Set for Service Catalog Request Records

Give your portal users access to the Service Catalog Request records using a sharing set. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Settings**.

2. In the Sharing Sets related list, click **New**.

3. Enter a label for the sharing set.

4. In the Select Profiles section, select your cloned community user profile and click **Add**.

5. Under Select Objects, select **Service Catalog Request**, and then click **Add**.

6. In the Configure Access section, configure access for the selected profile and object.

   a. Next to Service Catalog Request, click **Set Up**.

   b. For User, select **Account**, for Target Service Catalog Request, select **Case.Account**, and for Access Level, select **Read Only**.

   c. Click **Update**.

7. Save your changes.

Update the URL Path Name

Add the URL Path Name of your Experience Cloud portal in the Service Requests component to give your portal users access to view the details of their service requests.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your Experience Cloud portal, click **Builder**.

3. Click **Service Requests**.

4. In the Service Requests dialog, for URL Path Name, enter the URL name that you entered when configuring the Financial Services Client Portal. For example, `MyBank`.

5. Confirm that the Community Page Name is **my-requests**.

6. Click **Preview**.

7. Click the **My Requests** page.

8. Click **Back to Builder**.

9. Under My Requests, click **Service Requests** and enter the URL Path Name.

10. Confirm that the Community Page Name is **my-requests**.

11. Preview and publish your changes.

Appointment Management

Give your portal users a personalized experience in scheduling appointments. Configure the My Appointments component in the Experience Builder to provide your portal users with options for scheduling in-person, phone, or video appointments. Portal users can see their upcoming and past appointments, and cancel scheduled appointments.

Create and Assign a Permission Set

Create and assign a permission set for portal users to grant the license and permissions they need to schedule and manage appointments in the Financial Services Client Portal.

Set Up a Sharing Set for Service Appointment Records

Give your portal users access to the Service Appointment records using a sharing set. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

Update Sharing Settings for Portal Users

Use organization-wide default sharing settings to set the baseline external access for Salesforce Scheduler records.

Configure the Inbound Appointment Flow

To let you portal users schedule new appointments, clone and activate the new inbound appointment flow and add it to your Experience Cloud Portal.

Activate Service Territory Data Integration Rule

Ensure that the service appointments scheduled by your portal users are routed to appropriate teams or individuals within specific regions or territories.

Manage Business Information for Appointment Booking

Manage information related to your business and stakeholders, such as service locations, service resources, skills, topics, and appointment templates. Configure this business information to provide a personalized experience for your portal users in scheduling appointments.

Set Up Video Appointments

Let your portal users book video appointments with service resources.

Create and Assign a Permission Set

Create and assign a permission set for portal users to grant the license and permissions they need to schedule and manage appointments in the Financial Services Client Portal.

1. Create a permission set.

   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.

   b. Click **New**.

   c. Provide a name for the permission set, for example `Appointment Access`.

   d. For License, select **Salesforce Scheduler**, and then save your changes.

   e. Click **System Permissions**.

   f. Edit the system permissions and enable the **Let a user be included in appointments in Salesforce Scheduler** permission.

   g. Save your changes.

2. Assign a permission set.

   a. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.

   b. Click a user who's assigned one of the customer community profiles.

   c. In Permission Set Assignments, click **Edit Assignments**.

   d. From Available Permission Sets, select the permission set that you created and an appropriate user profile permission set.

   For example, if the customer user profile is Customer Community, select Financial Services For Customer Community as the user profile permission set.

   e. Click **Add**.

   f. Save your changes.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign permission sets:
- Assign Permission Sets

Set Up a Sharing Set for Service Appointment Records

Give your portal users access to the Service Appointment records using a sharing set. A sharing set grants portal users access to a record associated with an account or contact that matches the user's account or contact. You can grant access to records through access mapping, which defines access for each object in the sharing set.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Settings**.

2. In the Sharing Sets related list, click **New**.

3. Enter a label for the sharing set.

4. In the Select Profiles section, select your cloned community user profile and click **Add**.

5. Under Select Objects, select **Service Appointment**, and then click **Add**.

6. In the Configure Access section, configure access for the selected profile and object.

    a. Next to Service Appointment, click **Set Up**.

    b. For User, select **Account**, for Target Service Appointment, select **Account**, and for Access Level, select **Read/Write**.

    c. Click **Update**.

7. Save your changes.

Update Sharing Settings for Portal Users

Use organization-wide default sharing settings to set the baseline external access for Salesforce Scheduler records.

SEE ALSO:

[Update Sharing Settings for Authenticated External Users Who Schedule Appointments](#)

Configure the Inbound Appointment Flow

To let you portal users schedule new appointments, clone and activate the new inbound appointment flow and add it to your Experience Cloud Portal.

1. Clone and activate the inbound appointment flow.

   a. From Setup, in the Quick Find box, enter `Flows`, and then click **Flows**.

   b. In the list view, locate and click **Inbound New Appointment**.

   c. Create a flow using the Inbound New Appointment template. To create a flow, click **Save As** and then enter a name for the flow label.

   d. Save your changes.

   e. Activate the flow.

2. Add the cloned flow to your Experience Cloud portal.

   a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

   b. Next to your Experience Cloud portal, click **Builder**.

   c. At the top-left corner of the builder, open the **Pages** menu.

   d. In the search bar, enter `New Appointment` and then click **New Appointment**.

   e. On the New Appointment page, click the **Flow Component**.

   f. In the Flow dialog, from the **Flow** dropdown, select the name of the inbound appointment flow that you cloned and activated earlier.

   g. Preview and publish your changes.

Activate Service Territory Data Integration Rule

Ensure that the service appointments scheduled by your portal users are routed to appropriate teams or individuals within specific regions or territories.

1. From Setup, in the Quick Find box, enter `Data Integration Rules`, and then select **Data Integration Rules**.

2. Select the **Geocodes for Service Territory Address** data integration rule.

3. If the data integration rule is inactive, activate the rule.

4. Save your changes.

Manage Business Information for Appointment Booking

Manage information related to your business and stakeholders, such as service locations, service resources, skills, topics, and appointment templates. Configure this business information to provide a personalized experience for your portal users in scheduling appointments.

- Configure users who can be service resources. Service resources are individual users in your org who can attend appointments with your portal users. See Configure Who Can Be a Service Resource.

- Create Appointment modes that are available to your portal users. See Customize Default Appointment Types in Salesforce Scheduler.

- Create basic skills in your org that you can assign to service resources. See Create Skills in Salesforce Scheduler.

- Set up operating hours that represent time slots during which your portal users can schedule appointments. See Create Operating Hours in Salesforce Scheduler.

- Create service resources who can attend appointments scheduled by your portal users. See Create Service Resources in Salesforce Scheduler.

- Assign skills to service resources to indicate their areas of expertise. Service resources are assigned appointments based on their skills. See Assign Skills to Service Resources in Salesforce Scheduler.

- Create service territories to organize your service resources and ensure that the service resources are assigned to appointments near their home branch. See Create Service Territories in Salesforce Scheduler.

- Assign service resources to service territories to ensure that appointment attendees are associated with the correct locations. See Assign Service Resources to Service Territories in Salesforce Scheduler.

- Assign service territories to service resources to ensure that appointment attendees are associated with all the locations where they're available. See Assign Service Territories to Service Resources in Salesforce Scheduler.

- Create work type groups to create appointment topics that are relevant for your portal users. See Create Work Type Groups in Salesforce Scheduler.

- Create work types to help organize and standardize the working day and appointment times of your service resources. See Create Work Types in Salesforce Scheduler.

- Assign operating hours to service territories. See Assign Operating Hours to Service Territories, Service Territory Members, and Work Types.

- Add skills for work types to ensure that an appointment is assigned to a service resource with the right skills. See Add Skill Requirements for Work Types in Salesforce Scheduler.

- Map each work type to a service territory. See Assign Work Types to Service Territories.

- Map each work type group to a work type. See Assign Work Type Groups to Work Types in Salesforce Scheduler.

Set Up Video Appointments

Let your portal users book video appointments with service resources.

1. Assign video call permissions to service resources. See Assign Video Call User Permission to Service Resources.

2. Enable video calling so that your portal users can set up video appointments. See Enable Video Calls.

3. Create a page on the Financial Services Client Portal to add the video call component. When a portal user initiates a video call, the face-to-face conversation between the portal user and the service resource takes place on this page.

   a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

   b. Next to your Experience Cloud portal, click **Builder**.

   c. Open the Pages menu on the top toolbar, and then click **New Page**.

   d. Click **Standard Page**, and then click **New Blank Page**.

   e. Select a layout, and then click **Next**.

   f. Enter a name, such as `Video` and a URL, such as `video-calls`.

   g. Enter an API Name, such as `Video_Calls_c`, and then click **Create**.

      Make a note of the API name to use it when you configure video calls.

   h. In the Builder, click **Components**, and then drag the **Video Call** component onto your page.

   i. Preview and publish your changes.

4. Create a named credential for virtual calls for connecting to a video call service provider. See Create a Named Credential for Virtual Calls.

5. Configure video appointments. See Configure Video Calls.

   📝 Note: When configuring the video call configuration values, for **Experience Cloud Page API Name**, enter the API name of the page that you created earlier.

Knowledge Management

Give your portal users access to browse knowledge articles and frequently asked questions. Add these knowledge sources to the portal's Knowledge Center component to help your portal users make informed decisions, resolve common issues independently, and expand their understanding of various financial services.

Enable Salesforce Knowledge in Financial Services Client Portal

Enable Salesforce Knowledge to quickly get articles to your customers and agents in your Experience Cloud portal. Knowledge articles provide accurate information to customers when and where they need it.

Enable Salesforce Knowledge in Financial Services Client Portal

Enable Salesforce Knowledge to quickly get articles to your customers and agents in your Experience Cloud portal. Knowledge articles provide accurate information to customers when and where they need it.

1. To use your knowledge base in the Experience Cloud portal, enable lightning knowledge. See Enable Lightning Knowledge.

2. To give your knowledge agents access to articles in Lightning Knowledge, specify which agents in your company are Salesforce Knowledge users and can create, edit, archive, and delete articles. See Provide access to Lightning Knowledge Users.

3. Specify a support email address. After you add that email, any email sent to that address generates a case in Salesforce. SeeOptimize Setup with the Service Setup Assistant.

4. Add knowledge authors who contribute knowledge articles for your Experience Cloud portal.

   a. In the Service Setup Assistant, click **View All** and select **Knowledge Setup**.

   b. Click **Start**.

   c. Select the names of the users whom you want as knowledge authors and click **Next**.

   d. Click **Finish**.

5. Create knowledge articles to be made available in your Experience Cloud portal.

   a. From the App Launcher, find and select **Knowledge**.

   b. Click **New**.

   c. Enter a title for the article. Click in the **URL Name** field to generate the URL Name from the title.

   d. Enter a question and an answer for the article.

   e. Under Properties, select **Visible to Customer**.

   f. Save your changes.

   g. Repeat these steps to create more articles.

   h. Publish the knowledge articles.

6. Enable Topics for Objects so that users can add topics to records of that object type on the record detail page.

   a. From Setup, in the Quick Find box, enter `Topics for Objects`, and then click **Topics for Objects**.

   b. Enable topics for Knowledge and select the **Answer**, **Assignment Note**, **Question**, **Title**, and **Summary** fields.

   c. Save your changes.

7. Update the community user profile to give users read permissions.

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

   b. Edit the cloned community profile.

   c. Under Knowledge Base Permissions, enable **Read** and **View All** access.

   d. Save your changes.

8. Add knowledge to your Experience Cloud portal using topics.

   a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

b. Next to your Experience Cloud portal, click **Workspaces**.

c. Select the **Content Management** tile.

d. Set up content topics.

Content topics organize your original content around common themes for your Experience Cloud portal. See Set Up Content Topics.

e. Set up navigational topics.

Structure your portal's content and help your users find what they need with navigational topics. See Set Up Navigational Topics.

f. Set up featured topics.

Featured topics highlight current, popular conversations in your community portal. See Set Up Featured Topics.

g. Assign topics to articles.

Easily add multiple topics of any type to specific articles. See Add Topics to Articles or Remove Them.

Feedback Management

Understand customer feedback as it evolves and engage customers with relevant, personalized surveys. Configure the Survey component in the Experience Cloud portal and link surveys to it to collect data from your customers.

EDITIONS

Available in: Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud license is enabled

Add a Survey

Create a standard survey and add it to your portal to collect data from your portal users.

Add a Survey

Create a standard survey and add it to your portal to collect data from your portal users.

- Enable surveys and configure survey settings. See Enable surveys and configure survey settings.
- Create a standard survey. See Create a standard survey to collect data from your portal users.
- Configure survey invitation links. See Send survey links to participants.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your Experience Cloud portal, click **Builder**.

3. At the top-left corner of the builder, open the **Pages** menu.

4. In the search bar, enter `Survey` and then select **Survey**.

5. On the Survey page, click the **Surveys** component.

6. In the Surveys dialog, select the standard survey you created earlier.

7. Preview and publish your changes.

Configure Permissions for Residential Loan Applications

Give your portal users the necessary permissions to submit a residential loan application and upload required documents.

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

2. Assign the borrower profile to your portal users.

SEE ALSO:

Create a Community User Profile for Borrowers

Assign the Borrower Profile to a Community

Configure User Permissions to Ask a Question

Give your portal users the necessary permissions to post a question about a topic and start a discussion in the Financial Services Client portal. Your portal users can use the Ask a Question feature on the portal to post questions.

1. Update the field-level security for Account Number, Balance, and Status fields on the Financial Account object.

   a. In Setup, go to **Object Manager**.

   b. In the Quick Find box, enter `Financial Account`, and select **Financial Account**.

   c. Select **Fields & Relationships**.

   d. Select **Account Number**.

   e. Click **Set Field-Level Security**.

   f. For the cloned community user profile, select **Visible** and deselect **Read-Only**.

   g. Save your changes.

   h. Repeat these steps for the Balance and Status fields on the Financial Account object.

2. Update the cloned community user profile.

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

   b. Select the cloned community user profile.

   c. Under System, select **System Permissions** and click **Edit**.

   d. Next to **Assign Topics**, select **Enabled**.

   e. Save your changes.

Tear Sheet Generation

Summarize information from objects in a tear sheet. By using the Summary Document component, your users can quickly generate a tear sheet that summarizes the information they need from one or more objects. To quickly access the document, your users can attach the document to an Account, Contact, or Financial Deal record page layout where the component is added.

Enable and Configure the Summary Document

Help your users access information quickly and easily and be better prepared for client meetings. The Summary Document component uses the capabilities of the Document Generation feature to generate documents that use the specified sample Server-Side OmniScripts. You can also create your own OmniScripts to generate documents.

Create Templates

Use the HTML-based Document Template Designer to design and assemble templates for generating tear sheets and to define the relationship between clauses and sections and the tear sheet template.

The Summary Document Component

Use the sample server-side OmniScript or use your own Server-Side OmniScript to generate documents.

SEE ALSO:

OmniStudio Release Notes

Enable and Configure the Summary Document

Help your users access information quickly and easily and be better prepared for client meetings. The Summary Document component uses the capabilities of the Document Generation feature to generate documents that use the specified sample Server-Side OmniScripts. You can also create your own OmniScripts to generate documents.

Before you begin, make sure that:

- The Managed Package Runtime OmniStudio setting is turned off.
- The OmniStudio managed package version 240.1 or later is installed.

1. Enable the Summary Document setting:

   a. From Setup, in the Quick Find box, enter `General Settings`, and then under Financial Services Cloud, select **General Settings**.

   b. Turn on **Summary Document**.

2. Add the Summary Document component to the Account, Contact, or Financial Deal record page layout:

   a. On the record page, click the Setup icon, and then select **Edit Page**.

   b. Drag the Summary Document component to the page.

3. Specify the Server-Side OmniScript that the component uses to generate documents:

   a. To use the file-based sample Server-Side OmniScript to generate documents, in the component's properties pane, for Type, select Tearsheet, and for SubType, select ServerSide.

   b. If you want to use your own OmniScript to generate documents, in the component's properties pane, provide your OmniScript's Type and SubType values.

   > Note: You can use your own OmniScript to generate documents only for document templates whose Usage Type is Tearsheets. Learn more about OmniStudio Document Generation Document Templates in Salesforce Help.

4. Optionally, enter a custom title for the Summary Document component:

   a. On the record page, from Setup, select **Edit Page**.

   b. Select the Summary Document component by clicking the component.

   c. In the properties pane, in the Custom Component Name field, enter a name for the component.

5. Save your changes.

SEE ALSO:

OmniStudio Server-Side Document Generation

EDITIONS

Available in: Lightning Experience in **Enterprise** and **Unlimited** Editions where Financial Services Cloud is enabled, and OmniStudio Winter '23 or later with DocGen functionality is installed.

USER PERMISSIONS

To enable and configure the Summary Document feature:

- Financial Services Cloud Extension permission set
- Customize Application
- OmniStudio Admin
- DocGenDesigner or DocGenRuntime

Create Templates

Use the HTML-based Document Template Designer to design and assemble templates for generating tear sheets and to define the relationship between clauses and sections and the tear sheet template.

Document Template Designer comes with a rich-text editor, making programming or coding unnecessary.

SEE ALSO:

[Document Template Designer](#)

The Summary Document Component

Use the sample server-side OmniScript or use your own Server-Side OmniScript to generate documents.

Server-Side document generation is asynchronous and is best for large documents and for batch generation of documents. The Server-side document generation service is secure and scalable and is hosted on Salesforce Hyperforce. The generated document is stored in your Salesforce instance, and is attached to the object for which the document is generated.

[Generate a Tear Sheet](#)
Generate the tear sheet by using the sample file-based Server-Side OmniScript.

Generate a Tear Sheet

Generate the tear sheet by using the sample file-based Server-Side OmniScript.

1. On the Summary Document component, click **New**.

2. Select a template.

3. Click **Next**.

4. Provide a name for the tear sheet.

5. Select the preferred document type.

   📝 Note: The sample Server-Side OmniScript supports generating tear sheets as Microsoft Word, Microsoft PowerPoint, Microsoft Word and PDF, or Microsoft PowerPoint and PDF documents.

6. Click **Next**.
   The tear sheet is generated in few minutes.

7. To preview the generated document, from the component, click the link to the document.

8. To delete a document, from the document's quick action menu, click **Delete**.

Timeline in Financial Services Cloud

Timeline provides a comprehensive and chronological view of customer interactions, showing key events relating to a person or a resource in one place.

📝 Note: To make Timeline available to Financial Services Cloud users, assign the Service Excellence permission set.

How Timeline Works in Financial Services Cloud

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

A user's profile permissions determine access to timelines. You can assign a user multiple timeline configurations.

For example, a user profile may have access to timelines that represent engagement data, investment decisions, and credit ratings.

Before you start configuring a timeline, identify your business requirements. At a minimum, decide which objects are required for the timeline and the information you want it to show.

EDITIONS

Available in: Lightning Experience

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

Set Up a Timeline in Financial Services Cloud

Configure interactive timelines that provide access to information about customers.

EDITIONS

Available in: Lightning Experience

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

User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you're including on the Timeline

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

2. Turn on **Timeline Configuration**.

   Note: Enabling Timeline is a one-time task. After you enable Timeline in your org, you can't disable it.

3. Click **New Timeline**.

   a. Enter a name for the timeline.

   b. Enter an API name for the timeline, or accept the name that's automatically generated.

   c. Select an object that serves as the basis for the timeline.

      You can base your timeline on any Salesforce object (standard or custom). You can add related objects to the timeline later.

      For example, to represent a customer's account history on a timeline, select Account as the timeline object.

      Note: If you use a custom object on your timeline, ensure that it displays correctly by making sure it has a custom tab. See Create a Custom Object Tab for more information.

    d. Click **Save**.

4. On the Global Settings page, turn **Show Age** on to show how old a record of the base or primary object was when an event occurred, along with the date of the event.

If the base object is Account, the age of the customer at the time of the event can be shown. Otherwise, only the event and the date appear.

5. If you chose to show age along with the timestamp, choose the field to use for calculating age.

To show the age of the customer, select the **Birthdate** field.

6. Click **Next**.

7. On the Timeline Related Objects page, click **Add Related Object**.

    a. Select a related object (standard or custom) that contains information you want to display on the timeline.

    You can add up to five related objects per base object. If an object has record types, you can select up to five record types.

    b. Select the field that associates the related object with the base timeline object, then click **Next**.

    If a related object has only one lookup to the base object, then the field is auto-selected and can't be changed.

    📝 Note: Enhanced Timeline doesn't support encrypted fields. Make sure any field you choose isn't encrypted.

    c. Add conditions for showing records on the timeline. You can add conditions only for indexed fields. Then click **Next**.

    For example, you can show tasks that aren't canceled or deferred.

    d. Select the Title, Subtitle, and Timestamp fields for the timeline events, and then click **Next**.

    Every event on a timeline has a title, an optional subtitle, and a timestamp, which are sourced from fields in the related object.

      • For title, you can use something like a Subject field. It might be something like "Retirement Investment Plan."

      • For subtitle, you can use something like a Description field. This could be something like "Optimized outlays for retirement."

- For timestamp, select a field that's likely to have a value, such as Created Date. The timestamp appears alongside the event on the timeline. Events without a timestamp don't appear on the timeline.

    e. Select the fields and related lists you want to display on the timeline, and then click **Add**.

8. To save the timeline and make it available for use, click **Activate**.

9. Preview the timeline you've configured by selecting a base object record in the View Timeline On field.
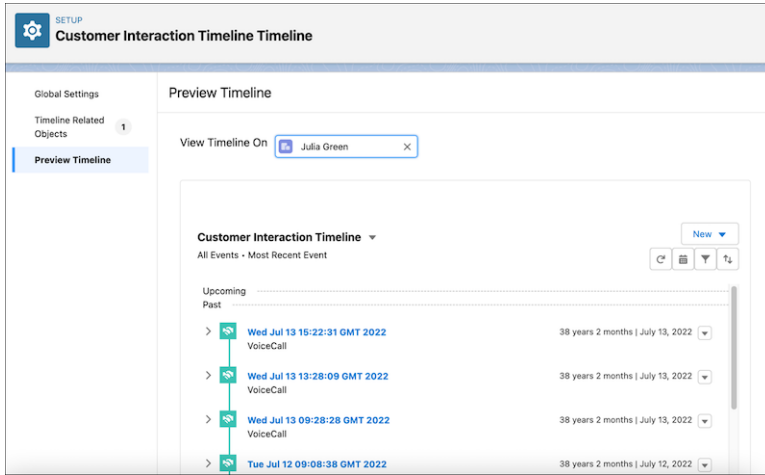
Add Timeline to a Record Page

To let your Financial Services Cloud users see the Timeline and its data, add it to a Lightning record page.
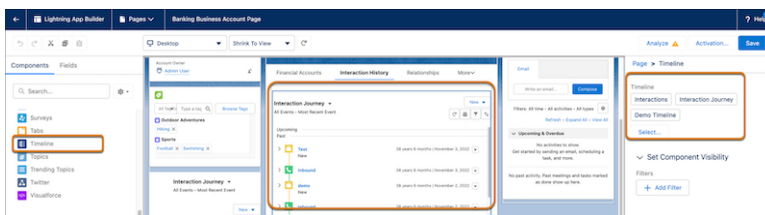
User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you're including on the Timeline

1. Go to the record page of the object on which you created a timeline.

2. Select the gear icon on the top-right corner of the page and then click **Edit Page**.

3. Drag the Timeline component to the editable content area.

4. To select the timeline configurations you want to make available to users, click **Select** in the component properties panel.

    Only active timeline configurations are available for selection.

5. In the Timeline window, select the required configurations and then click **OK**.

    You can select up to 5 timeline configurations.

6. Save and activate your changes.

Add Timeline to Your Experience Cloud Site

To let people use Timeline without logging in to Financial Services Cloud, add it to your Experience Cloud site.

User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you're including on the Timeline

1. From Setup, in the Quick Find box, enter `All Sites` and select **All Sites**.

2. Click **Builder** for the site in which you want to add Timeline.

You can add Timeline to only those sites that support record detail pages.

3. Select the required record page from the Home menu.

4. Drag the **Timeline** component from the Components menu to the relevant content area.

5. In the Timeline properties panel, click **Select…**.

6. In the Timeline window, select the required configurations and then click **OK**.

You can select up to five configurations.

7. Publish your changes.

Add-Ons for Financial Services Cloud

Set up and manage products that you can add on to Financial Services Cloud.

To get any of these add-ons, talk to your Salesforce Account Executive.

Financial Services Cloud Experience Cloud Sites

Provide partners and customers with access to Financial Services Cloud through Experience Cloud licenses for external users. With Experience Cloud, you can give access to a client's profile, including account details, financial accounts, and more. An advisor, client, or customer can access client account information in a site.

Deploy CRM Analytics for Financial Services

CRM Analytics for Financial Services gives financial advisors and personal bankers a comprehensive customer intelligence solution based on the CRM Analytics platform. It includes Einstein Discovery, which lets you create automated AI models on any dataset without writing code.

Data Cloud for Financial Services Cloud

Data Cloud for Financial Services Cloud connects and integrates client data to give financial institutions a unified view of their client. It provides you with a number of capabilities to unify and activate data across channels, such as interaction, behavioral, and transactional data.

Revenue Intelligence for Financial Services

Get predictions about Retail Management and Wealth Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Identify Wealth Management customers are likely to add more assets in a specific period, pursue such customers by pitching products for sale to increase your assets under management. Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.

Salesforce Scheduler

With Lightning Scheduler, you can provide personalized experiences to your customers or prospects by precision-scheduling appointments—in person or by phone or video—with the right person at the right place and time. You can easily embed appointment scheduling into standard Salesforce workflows, such as leads and referrals, opportunities, and accounts.

Securing Your Data with Salesforce Shield

Salesforce Shield—a set of security tools that helps you protect data at rest, monitor usage, and prevent malicious activity—is fully supported. If you implement Shield, remember these considerations when securing your confidential client data using Platform Encryption, event monitoring, and Field Audit Trail.

Marketing Cloud Engagement

Create and send emails using Marketing Cloud Engagement for Financial Services Cloud. Use the customizable email templates to save time and send personalized emails to your clients. Synchronize your Salesforce data with Marketing Cloud so that you always have the most up-to-date client information in your emails.

Connect to Customers with Account Engagement in Financial Services Cloud

Access Marketing Cloud Account Engagement (Pardot), a full suite of marketing tools, in Financial Services Cloud.

Support Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get customer-submitted information such as W2 forms, tax returns, or other financial documents faster using the Intelligent Form Reader.

Intelligent Form Reader

Intelligent Form Reader provides optical character recognition to automatically extract data from financial documents. You specify the data's source form, then map the fields in the form to the equivalent fields in Salesforce. Use the extracted information to create or update record fields or to verify existing data. For example, check a birthdate in Salesforce against the birthdate in a scanned passport.

Financial Services Cloud Intelligent Document Reader

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the form, upload the form, and map the form's fields to a Salesforce object's fields. For example, you can specify that a customer's asset amount in a bank statement must be stored in the Amount field of the account's AssetsAndLiabilities record. The extracted information can be used to create or update record fields, or to verify data that's already in the org. For example, you can check a person's birth date against the birth date in their scanned passport.

Einstein Bots

Provide customers with intelligent, self-service bots. With Einstein Bots, you can launch a fully featured bot that integrates with your Salesforce data in a few clicks! Bots can automate your company's frequent tasks, increasing your deflection rate and freeing up agents for more complicated requests.

Financial Services Cloud Experience Cloud Sites

Provide partners and customers with access to Financial Services Cloud through Experience Cloud licenses for external users. With Experience Cloud, you can give access to a client's profile, including account details, financial accounts, and more. An advisor, client, or customer can access client account information in a site.

📝 **Note:** To set up Financial Services Cloud Experience Cloud sites, make sure that you have user licenses for Financial Services Cloud and Experience Cloud. Community user licenses and profiles are used in Experience Cloud sites.

🛑 **Important:** All the Financial Services Cloud for Experience Cloud licenses have a corresponding permission set license for each version so that new capabilities can be added to each license as appropriate. The new licenses are:

- Financial Services For Customer Community
- Financial Services For Customer Community Login
- Financial Services For Customer Community Plus
- Financial Services For Customer Community Plus Login
- Financial Services For Partner Community
- Financial Services For Partner Community Login

These licensing changes don't impact existing capabilities. Relevant permissions are carried over to the new permission set licenses. New Financial Services Cloud capabilities are added only to the new permission set licenses so make the updates to access new features. Note that the old permission sets can no longer be assigned to users.

Reassign the new permission set licenses to your users.

Assign the new permission set licenses to your users. Next, unassign the **Financial Services Community** and **Financial Services Community Extension** permission sets. Then, unassign the **Financial Services Community** and **Financial Services Community Extension** permission set licenses.

📝 **Note:** You can perform this operation in Setup or by using Data Loader for bulk assignment. For information on using Data Loader to bulk assign permissions, see Bulk-Assign Permission Set Licenses. The context for this procedure is Health Cloud but the process is the same for Financial Services Cloud.

🛑 **Important:** If you have custom code that automatically manages the assignment of permission set licenses for Experience Cloud users, update the custom code to use the new permission set licenses.

Configure a partner site, a customer site, or both, depending on your users' needs.

If you configure a single site and provide access to partner and customer site users, create page variations for each user profile. Members of this site use the same URL, but partner and customer users see different home pages, each tailored with the Financial Services Cloud components relevant to their needs.

Configure a Partner Experience Cloud Site
The Financial Services Cloud managed package includes an Advisor Partner Community profile and permission set to let you expose account details and financial accounts information to your independent advisors. You can then create custom pages for your Experience Cloud site with Experience Builder so that independent advisors can access Financial Services Cloud information.

Create a Self-Service Financial Services Client Portal
Work with a Financial Services Client Portal Experience Builder template to create a self-guided loan application and financial account experience for your customers. Perform initial setup and branding, configure components, and then deploy a working portal to your sandbox in about 30 minutes.

Financial Services Cloud Experience Cloud Permission Sets
Give Experience Cloud users access to Financial Services Cloud features by assigning Financial Services Cloud Experience Cloud permission sets.

Create an Advisor Partner Site User Profile
Create a profile for independent advisors by cloning the Partner Community User profile. This cloned profile becomes the baseline that grants independent advisors access to Financial Services Cloud features.

SEE ALSO:

> *Salesforce Help*: Experience Cloud User Licenses

Configure a Partner Experience Cloud Site

The Financial Services Cloud managed package includes an Advisor Partner Community profile and permission set to let you expose account details and financial accounts information to your independent advisors. You can then create custom pages for your Experience Cloud site with Experience Builder so that independent advisors can access Financial Services Cloud information.

Before you begin, make sure that you have a site to configure for Financial Services Cloud. Follow these steps to activate the Advisor Partner Community profile and the relevant permission set.

📝 **Note:** Partner Community profiles are used in Experience Cloud sites.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**.

2. Next to your site name, click **Workspaces**.

3. From Experience Workspaces, click **Administration** and then click **Members**.

4. From Search, select **Portal**.

5. From the Available Profiles list, select one of the following based on your Experience Cloud user license:

   - **Advisor Partner Community**

     For Partner Community user license

   - **Advisor Partner Community Login**

For Partner Community Login user license

- Your custom Partner Community profile

6. Click **Add**.

7. From the Available Permission Sets list, select **Advisor Partner Community** and then click **Add**.

8. Save your changes.

9. Click **Settings** and then click **Activate**.

Create a Self-Service Financial Services Client Portal

Work with a Financial Services Client Portal Experience Builder template to create a self-guided loan application and financial account experience for your customers. Perform initial setup and branding, configure components, and then deploy a working portal to your sandbox in about 30 minutes.
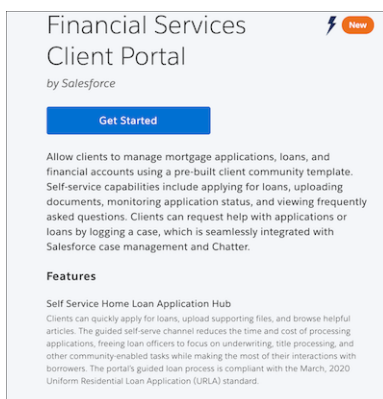
From the Financial Services Client Portal site template, configure prebuilt flow components that allow customers to:

- Start a loan application and upload required documents.

- Display application summaries and drill down to update records

- Browse articles and FAQs to guide their journey and use Chatter to contact their relationship manager or loan officer.

- Launch a self-service flow to request help, including a forbearance modification, for any loan application, bank account, or generic customer issue.

Customers can launch any of these flows from the portal home page.

Note: The Financial Services Client Portal follows standard Experience Workspaces conventions:

- Use Experience Builder to configure, brand, and otherwise customize the Home page and the prebuilt flow components.

- Optionally use Flow Builder to modify the flows.

- Use Content Management and Moderation to set up the Knowledge Base.

- Take advantage of prebuilt analytics using Dashboards.

FSC Portal Experience Cloud Site Setup Checklist

The Financial Services Client Portal Experience Builder template is anchored by a home page that provides flow components. The prebuilt components wrap each flow and allow customers to launch the flow. Use this checklist as a guide to perform Experience Cloud site setup tasks, to brand the home page and flows, and to update component properties.

Work with the FSC Portal Home Page

The Financial Services Client Portal home page and tiles are ready to brand and personalize for your Experience Cloud site.

Experience Builder Components Provided in Financial Services Cloud

Work with Experience Builder to configure the existing components and optionally add components to pages. The prebuilt components wrap flows that customers use to start or modify a loan application, upload supporting documents, browse FAQs and other Salesforce knowledge features, or request help.

FSC Portal Experience Cloud Site Setup Checklist

The Financial Services Client Portal Experience Builder template is anchored by a home page that provides flow components. The prebuilt components wrap each flow and allow customers to launch the flow. Use this checklist as a guide to perform Experience Cloud site setup tasks, to brand the home page and flows, and to update component properties.

Before You Begin

Gather your branding assets

High-resolution image of your company logo

Color scheme (or an image to upload to automatically generate one)

Image to use as a compact header

Thumbnail images (385x385 pixels), if you're using Featured Topics in Salesforce Knowledge.

Configure the internal Salesforce org

Create a domain for the Financial Services Client Portal. To setup the domain, see Enable Digital Experiences.

Choose a unique URL that works for your business, because you can't change it after it's been set.

Obtain a license for and enable Salesforce Knowledge.

Launch the Financial Services Client Portal Template

Under All Sites, click **New** and select **Financial Services Client Portal**.

On the Financial Services Client Portal page, click **Get Started**.

On the Enter a Name page, enter a name for your portal and click **Create**. If you're creating multiple sites, differentiate the beginning of the site name. Site are truncated in the global header dropdown menu. Users can see up to 32 characters of the name, and names include the status. Make sure that the visible part of the name allows users to distinguish between multiple sites.

Enter a URL for your site and click **Create**. This name is appended to the domain that you created when you enabled digital experiences for this org. For example, if your site domain name is `UniversalTelco.my.site.com` and you're creating a customer site, you can enter `customers` to create the unique URL `UniversalTelco.my.site.com/customers`.

Specify object-level permissions. For example, add Read access to Accounts, Contacts, Cases, Documents, Problems, and Goals.

Create site users

Create users. When you create site users manually, assign a community user profile to them and clear the `Salesforce 1` checkbox.

☐ Set Shared Settings to Public Read Only. In Setup for your site, enter Shared Settings and in the Organization-Wide Defaults table make sure that the User object is set to Public Read Only for both Default Internal Access and Default External Access.

Update the CommunityProfileName custom setting with the value *Financial Services Client Portal - Community*. This value is the name of your site profile. From Setup, enter *Custom* in the `Quick Find` box, then select **Custom Settings**. Click **Manage** next to CommunityProfileName, and then click **New** to add the name and the value for the site.

Perform General Configuration Steps in Setup

Perform the following setup tasks from the Digital Experiences node in Setup.

Manage contributors. Create roles, as needed, for the contributors who create, edit, review, and publish your site. Assign role-based access appropriate to each contributor's purview.

Assign user permissions. Use permission sets to assign your users licenses to the mortgage feature and document checklist items and to establish borrower access to the site.

Assign loan officer permissions. Create a permission set to give loan officers access to mortgage and document checklist features.

Configure field level security. Assign security to control access to sensitive data in the site. Field permissions specify the access (view or edit) level for each field in a record.

Configure login preferences. Configure the default login, log out, password management, and self-registration options for your site.

Enable Change Data Capture to receive notification of changes to mortgage records. Prompt notification of changes to financial records can help speed approval of loan applications and support a responsive customer relationship culture. In Setup for your site, enter `change data capture`, select and shuttle mortgage objects from the Available Entities to the Selected Entities panel, and click **Save**. Then subscribe to change notifications.

Perform Configuration Steps in Experience Builder

From Setup, enter `Digital Experiences` in the `Quick Find` box, then select **All Sites**. Click **Builder** to work with your Financial Services Portal Client site.

Brand your site. Add your logo and use Experience Builder tools to efficiently apply color and style to your landing page, its menus, and component flow tiles.

Edit Experience Builder pages. Remove unwanted default pages from the template and create more pages, as needed. To allow access the new pages you create, be sure to update the navigation menu.

Update component properties. Review and update the properties for the Mortgage Flow Launcher , the Open Loan Application, the Section Summary View, the Loan Officer Information and any other components that you add or use.

Work with CMS Workspaces to author and configure Salesforce Knowledge topics. The self-guided customer journeys include Salesforce Ask a Question flow, the Create a Case flow, and searchable, sortable FAQs, discussions, and articles.

Work with Moderation Workspaces to manage pre-configured moderation rules, to enable site members to flag inappropriate contributors and content, and to track and manage flagged site discussions.

Preview, test, and publish your site. Look at your site in a desktop browser window and on mobile devices. When you're happy with your changes, click **Publish** in the toolbar.
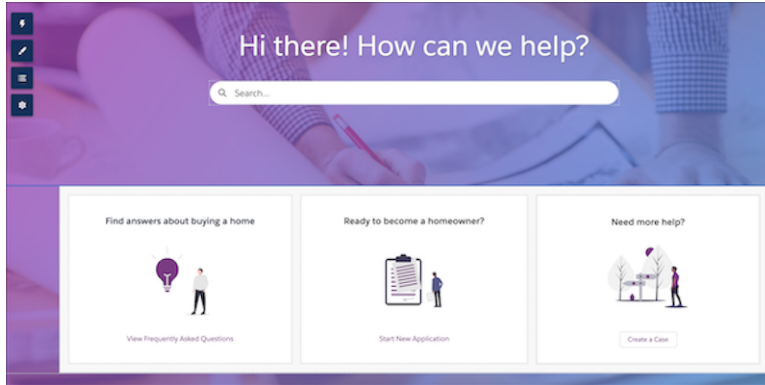
Work with the FSC Portal Home Page

The Financial Services Client Portal home page and tiles are ready to brand and personalize for your Experience Cloud site.
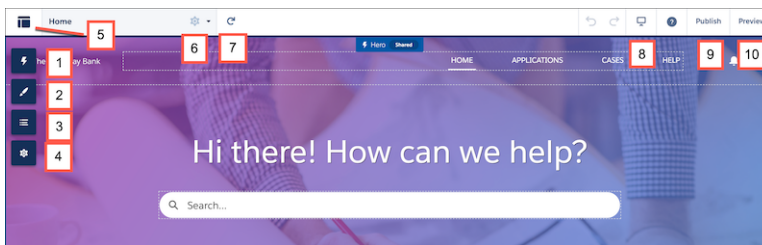
EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Using Experience Builder, you can:

- Add your own logo, colors, font, and copyright so that the Client Portal site matches your company's branding and is instantly recognizable to your site members.

- Add and apply branding sets and optionally select audiences for specific branding sets.

- Edit page menus, navigation links, and component placement.

📝 **Note:** The FSC Portal components, menus, navigation, and linked pages allow thorough thematic branding and layout modification but require minimal flow configuration. The prebuilt components, navigation, and flows support self-guided loan application and financial account customer journeys.

👁 **Example:** From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. Drag additional Lightning components as needed onto your page. The three portal tiles contain prebuilt, self-guided flows that are customer-ready.

2. Theme the site to match your organization's brand and style. Upload and manage branding sets and optionally assign audiences to each set.

3. View all the components on the current page. To brand or change a component's properties, select the component.

4. Edit site settings and accept updates to your site's template.

5. Use the Experience menu to:

   - Navigate to the currently live version of your site.

   - Open Experience Workspaces or Experience Management to manage site analytics, login, registration, reputation, topics, and other settings.

   - Return to Setup.

6. Navigate to the site page that you want to edit using the Pages menu and Page Variation menu. Customize the Hero, Header, and Footer elements and menus. Manage, create, delete, and set the visibility of pages in Page Properties for each page.

7. Refresh the current page.

8. Preview your site on different devices.

9. Publish your changes to make your updates available to everyone in your site.

10. Preview the site in a new browser window.

Experience Builder Components Provided in Financial Services Cloud

Work with Experience Builder to configure the existing components and optionally add components to pages. The prebuilt components wrap flows that customers use to start or modify a loan application, upload supporting documents, browse FAQs and other Salesforce knowledge features, or request help.

Mortgage Flow Launcher
The Mortgage Flow Launcher is preconfigured as a self-guided help request flow. Optionally configure it to add useful flows to Experience Builder pages.

Open Loan Application
The Open Loan Application component summarizes each non-closed application in a tile on the borrower's Profile page. Configure this component to display the Start New Application flow when the borrower has no applications in process.

Section Summary View
The Section Summary View component displays borrower loan information on the Summary tab of the Residential Loan Application page. The information is displayed in expandable sections that correspond to the United Residential Loan Application. Configure which sections to display and customer permissions to view, and edit loan information.

Loan Officer Information
The Loan Officer Information component displays useful contact information to customers. Optionally configure the contact information or add the tile to other Experience Builder pages.

Mortgage Flow Launcher

The Mortgage Flow Launcher is preconfigured as a self-guided help request flow. Optionally configure it to add useful flows to Experience Builder pages.
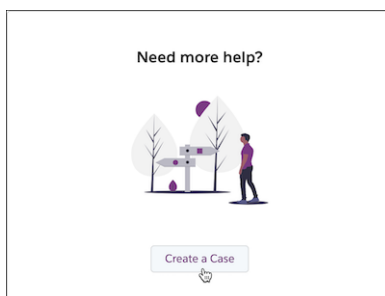
The Mortgage Flow Launcher's prebuilt Create a Case flow takes the customer through a self-guided help request journey.

- After launching the flow, the customer selects the financial account or loan application they need help with. The flow passes the record ID of the selected account or application to the next screen.

> 📝 **Note:** If the customer has no registered accounts or loan applications, the flow skips the account selection step. The customer can then create a case that isn't linked to an account or application record ID.

- The flow prompts the customer to enter details about the help request.

- The customer optionally uploads supporting documentation.

- The flow affirms the case is created and presents a link to the case summary page. There, customers can update case details, and use Chatter to reach a customer relationship manager or loan officer.

The underlying customer-guiding flow of the Mortgage Flow Launcher is suitable for a variety of journeys. You can quickly configure it to run other customer flows.

👁 **Example:** **Add an Assets and Liabilities Flow**

From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail**.

2. From the Components panel, drag the Mortgage Flow Launcher to an editable space on the Residential Loan Application Detail page.

3. In the Flow dropdown of the Mortgage Flow Launcher panel, click **Assets and Liabilities**.

   > 📝 **Note:** To see or modify the Assets and Liabilities component flow, click **Edit in Flow Builder**.

4. In the Title field, enter the title for the repurposed tile.

5. In the Subtitle field, enter a subtitle.

6. In the Button Label field, enter a button label that customers click to launch the flow.

7. To brand the tile, edit component properties and upload branded assets.

👁 Example: **Add a Co-Borrower Information Flow**

From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.
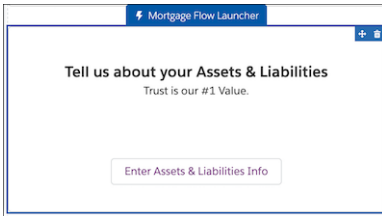
1. In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail.**

2. From the Components panel, drag the Mortgage Flow Launcher to an editable space on the Residential Loan Application Detail page.

3. In the Flow dropdown of the Mortgage Flow Launcher panel, click **Borrower Information**.

   📝 Note: To see or modify the Borrower Information component flow, click **Edit in Flow Builder**.

4. In the Title field, enter the title for the repurposed tile.

5. In the Subtitle field, enter a subtitle.

6. In the Button Label field, enter a button label that customers click to launch the flow.

7. To brand the tile, edit component properties and upload branded assets.
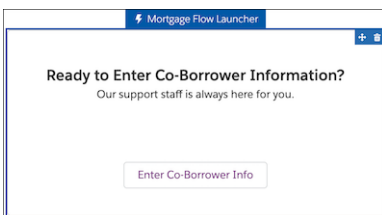

Open Loan Application

The Open Loan Application component summarizes each non-closed application in a tile on the borrower's Profile page. Configure this component to display the Start New Application flow when the borrower has no applications in process.

The Open Loan Application component displays all non-closed loan applications as tiles on the borrower's profile page. Each tile displays application details including:

- The name of the loan (hyperlinked to the Applications page).
- The amortization type.
- The amortization term in months.
- The interest rate.
- The address of the property.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

It's helpful to configure the Open Loan Application component to display the Start New Application flow tile when the borrower has no open applications. Borrowers without open loan applications can then launch the new application flow from their Profile page.

👁 Example: **Configure a Start New Application Flow**

From Setup, in the Quick Find box, enter `Digital Experiences`, and then select All Sites. On the All Sites page, click **Builder** next to your Client Portal site.

1. Launch the Financial Services Client Portal in Experience Builder.

2. Click **Preview**.

3. From the top menu of the Pages>User menu on the Home page, click **User Profile.**

4. On the Profile page, click **Back to Builder**.

5. Hover over and click the Open Loan Application component.
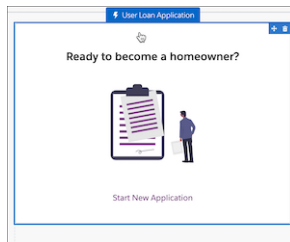
6. In the User Loan Application configuration panel, click the **Show Start New Application** checkbox.

   The enables the Start New Application flow tile to display when the borrower has no non-closed applications.

7. Optionally enter a title in the Open Application Title field

8. Optionally enter a label in the Start New Application label field.

9. Optionally enter a label in the Link Label field.

   The link is to the Residential Loan Application page, where borrowers can create a loan application.

10. Use the Color, Image, Image Layout, and Image Position controls to brand and customize the tile.

11. To display the Start New Application tile, click **Preview**.

Section Summary View

The Section Summary View component displays borrower loan information on the Summary tab of the Residential Loan Application page. The information is displayed in expandable sections that correspond to the United Residential Loan Application. Configure which sections to display and customer permissions to view, and edit loan information.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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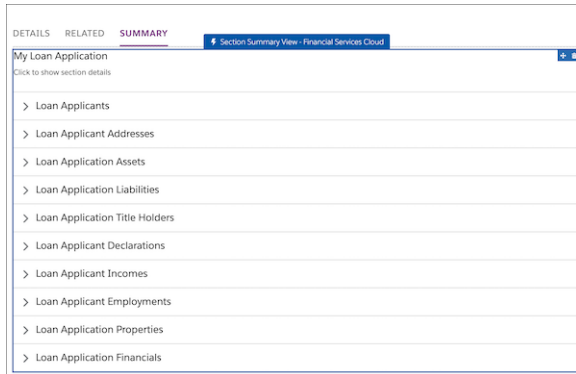
Borrowers interact with the portal to enter application information and upload required documents. The Summary View presents these inputs as sections that borrowers and loan officers can display and update.

Select the sections you want to display and where to display them in the Section Summary View. Set borrower and other user permissions to view or edit application details.

👁 Example: **Configure Summary Sections**

From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. On the All Sites page, click `Builder` next to your Client Portal site.
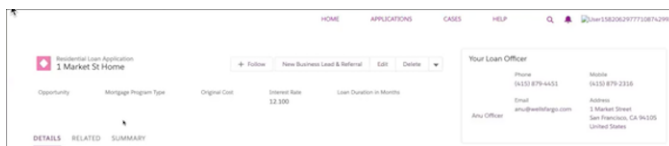
1. In the Home>Residential Loan Application dropdown menu, click **Residential Loan Application Detail**.

2. On the Residential Loan Application Detail page, click the **Summary** tab.

3. Hover over the **Section Summary View** panel and click.

4. To configure borrower permission to read or edit summary details, click the **Mode** dropdown and choose from the selections.

5. To remove or rearrange the summary sections, click **Select**.

6. To choose which sections to display, in the Sections to Display panel, drag summary items from the Available column to the Selected column.

7. To change the order in which the Summary View tile displays summary sections, drag sections up or down in the Selected column.

8. To update the label for a section, in the side panel enter a name, or leave it blank to use the default value.

9. Click **OK**.

10. To display your configuration, click **Preview**.

Loan Officer Information

The Loan Officer Information component displays useful contact information to customers. Optionally configure the contact information or add the tile to other Experience Builder pages.

The Loan Officer Information component displays contact information for borrowers on the Residential Loan Application Detail and Summary pages. You can relocate it on theses page, drag it to other portal pages, and configure the contact fields.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

👁 Example: **Configure Contact Fields**

From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. On the All Sites page, click **Builder** next to your Client Portal site.

1. From the top menu, click **Applications**.

2. On the Applications page, click the **Loan Officer Information** tile.

3. To display the Fields to Display panel, click **Select**.

4. In the Fields to Display panel, choose contact details to display for the Loan Officer Information tile. Drag Selected detail boxes up and down to arrange the display of these fields. Click **OK**.

> Your Loan Officer
>
> | | |
> | Phone | Mobile |
> | (415) 879-4451 | (415) 879-2316 |
> | | |
> | Email | Address |
> | anu@wellsfargo.com | 1 Market Street |
> Anu Officer | | San Francisco, CA 94105 |
> | | United States |

5. In the Loan Officer Information panel, optionally enter a title in the Title field.

6. In the Record ID field, enter the Account ID of the loan officer.

👁 Example: **Add a Loan Officer Information Tile**

📝 Note: You can drag the Loan Officer Component onto other pages. Navigate to the page and click the **Components** icon to display the dropdown panel. Under Mortgage, drag the Loan Office Information component to an editable region on the page canvas. Then configure the component's display fields. The Components menu lists only components that are compatible with the selected page.

Financial Services Cloud Experience Cloud Permission Sets

Give Experience Cloud users access to Financial Services Cloud features by assigning Financial Services Cloud Experience Cloud permission sets.

Experience Cloud Permission Sets

Permission Set License	Description
Customer Community for Financial Services	Allows the customer community user to access Financial Services Cloud features.
Customer Community for Financial Services - Login	Allows the login-based customer community user to access Financial Services Cloud features.
Customer Community Plus for Financial Services	Allows the customer community plus user to access Financial Services Cloud features.
Customer Community Plus for Financial Services - Login	Allows the login-based customer community plus user to access Financial Services Cloud features.
External Apps for Financial Services	Allows the external apps user to access Financial Services Cloud features.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Permission Set License	Description
External Apps for Financial Services - Login	Allows the login based external apps user to access Financial Services Cloud features.

📝 **Note:** When assigning a Financial Services Cloud Experience Cloud License to a user, select the license that matches the user's Experience Cloud License. For example, if a user has a Customer Community Plus permission set, assign the user Customer Community Plus for Financial Services permission set.

SEE ALSO:

Salesforce Help: Experience Cloud User Licenses

Create an Advisor Partner Site User Profile

Create a profile for independent advisors by cloning the Partner Community User profile. This cloned profile becomes the baseline that grants independent advisors access to Financial Services Cloud features.

📝 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

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

2. Next to the Partner Community User profile or Partner Community Login User profile, click **Clone**.

The user profile is based on your community user license.

3. Give it a name, such as `Advisor Partner Community User` or `Advisor Partner Community Login User`.

4. Save your changes.

Enable Advisor Partner Community Permissions

Enable required permissions and field-level security settings for the Advisor Partner Community User profile so independent advisors can access Financial Services Cloud features.

Financial Services Cloud provides an Advisor Partner Community permission set. Make sure to assign both the Advisor Partner Community User profile and the Advisor Partner Community permission set to your independent advisors.

📝 **Note:** Community user profiles are used in Experience Cloud sites.

💡 **Tip:** To access permission sets, from Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**. Later, when you're ready to assign the permission set to your advisor partners, select **Manage Assignments**.

You can edit the Advisor Partner Community User profile because you created it. You can't edit the Advisor Partner Community permission set. If you want to add permissions to the Advisor Partner Community permission set, create another permission set for the extra permissions. Keeping them separate helps ensure that future upgrades to the Advisor Partner Community permission set don't affect your additions.

1. From Setup, enter `Profiles` in Quick Find, then select **Profiles**.

2. Click **Advisor Partner Community User** or **Advisor Partner Community Login User**.

3. Enable these permissions.

- Import Leads
- Manage Leads

- Transfer Cases
- Transfer Leads

4. Save your changes.

5. Set field permissions for the `Type` field in the Task object. Depending on which interface you're using, do one of the following:

   - Permission sets or enhanced profile user interface—In Find Settings..., enter `Task` and select **Tasks** from the list. Edit the task and enable Read and Edit for the `Type` field.

   - Original profile user interface—In the Field-Level Security section, select **View** next to Task. Edit the task and enable Read and Edit for the `Type` field.

6. Verify the record type settings for these objects.

   - Events include and default to `Advisor Event`

   - Leads include General and Retirement Planning and defaults to `Retirement Planning`

   - Opportunities include General, Retirement Planning, and Opportunity (Wallet Share) and defaults to `Opportunity (Wallet Share)`

   - Tasks include and defaults to `Advisor Task`

Create an Advisor Partner User

Configure a contact as an advisor partner user so that the contact can access the Financial Services Cloud Experience Cloud site.

Before you can configure a contact as an advisor partner user, the owner of the contact record must have a role assigned.

📝 **Note:** Complete these steps in Salesforce Classic.

1. Assign a role to the owner of the contact record.

   a. From Setup, enter `user` in Quick Find, then select **Users** > **Users**.

   b. Next to the owner of the contact record, click **Edit**.

   c. From the General Information section, select a role, such as CEO.

   d. Save your changes.

2. Enable the contact and the contact's related account as external partner users.

   📝 **Note:** The contact must have a standard related account.

   a. From the contact record page, click the account name in Related Accounts.

   b. Select **Manage External User** > **Enable Partner User**.

   c. From the New User page, in the General Information section, select the **Partner Community** user license and **Advisor Partner Community** profile.

   📝 **Note:** Community user licenses and profiles are used in Experience Cloud sites.

   d. Save your changes.

   e. From the contact record page, select **Manage External User** > **Enable Partner User**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

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f. From the New User page, in the General Information section, select the **Partner Community** user license and **Advisor Partner Community** profile.

> **Note:** Community user licenses and profiles are used in Experience Cloud sites.

g. Save your changes.

3. Assign a permission set.

a. From the contact's user page, click **Permission Set Assignments** and then click **Edit Assignments**.

b. From Available Permission Sets, select **Advisor Partner Community** then click **Add**.

c. Save your changes.

If the site is activated, an email is sent to the advisor partner user with site access information.

Next, you can configure Financial Services Cloud Lightning components in your site with Experience Builder.

SEE ALSO:

Set Up a Customer Experience Cloud Site

Empower customers with Financial Services Cloud Experience Cloud sites.

To set up a customer site, create a new user and assign it a user profile, a permission set license, and the Customer Community Read Only permission set. The four out-of-the-box customer community profiles map to the customer community licenses: Client Customer Community, Client Customer Community Plus, Client Customer Community Login, and Client Customer Community Plus Login.

> **Note:** Community user licenses and profiles are used in Experience Cloud sites.

Configure a Customer Experience Cloud Site

The Financial Services Cloud managed package includes Customer Community profiles and a permission set to let you expose account details and financial accounts information to Experience Cloud site users. You can then create custom pages for your site with Experience Builder, so that site users can access Financial Services Cloud information.

> **Note:** Customer Community user licenses and profiles are used in Experience Cloud sites.

> **Note:** The Leads and Opportunities components aren't available in Customer Community user licenses.

Before you begin, make sure that you have an Experience Cloud site to configure for Financial Services Cloud. Follow these steps to activate Community profiles and the Customer Community Read Only permission set.

1. From Setup, enter `Digital Experiences` in Quick Find, then select **All Sites**.

2. Next to your site name, click **Workspaces**.

3. From Experience Workspaces, click **Administration**, and then click **Members**.

4. From Search, select **Portal**.

5. From the Available Profiles list, select one of the following based on your community user license:

- Client Customer Community

- Client Customer Community Plus
- Client Customer Community Login
- Client Customer Community Plus Login

For Customer Community user license:

- Customer Community
- Customer Community Plus

For Customer Community Login user license:

- Customer Community Login
- Customer Community Plus Login

6. Click **Add**.

7. From the Available Permission Sets list, select **Customer Community Read Only**, and then click **Add**.

8. Save your changes.

9. Click **Settings**, and then click **Activate**.

Create a Customer Community User Profile

Create a profile for site users by cloning a community user profile. This cloned profile becomes the baseline that grants site users access to Financial Services Cloud features.

> **Note:** Community user licenses and profiles are used in Experience Cloud sites.

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

2. Next to the user profile that maps to your customer communities license, click **Clone**

3. Give it a name, such as *Banking Customer Community User*.

4. Save your changes.

Enable Customer Community Permissions

Enable the Customer Community Read Only permission set to provide the permissions and field-level security settings that customer site users need to access Financial Services Cloud.

> **Note:** Community user profiles are used in Experience Cloud sites.

Follow these steps to enable the Customer Community Read Only permission set:

1. From Setup, enter *Manage Users* in Quick Find, then select **Users**.

2. Select a user name.

3. Select the **Permission Set Assignments** related list.

4. Click **Edit Assignments**.

5. Select **Customer Community Read Only** in Available Permission Sets and add it to Enabled Permission Sets.

6. Save your changes.

.

Tip: To assign permission sets to multiple users, from Setup, enter Permission Sets in Quick Find, then select Permission Sets and then select the relevant permission set. When you're ready to assign the permission set to customer site users, select Manage Assignments.

Note: You can't edit the Customer Community Read Only permission set. If you want to grant additional permissions, create a new permission set and use it with the Customer Community Read Only permission set; any future upgrades to the out-of-the box permission set is applied. If you want to remove permissions, clone the Customer Community Read Only permission set and then make the required changes.

Create a Customer User

Create a customer user and assign the required permissions to enable access to Financial Services Cloud in Experience Cloud customer sites.

Before you can create a customer user, the owner of the contact record must have a role assigned.

Note: Complete these steps in Salesforce Classic:

1. Assign a role to the owner of the contact record.

   a. From Setup, enter `user` in Quick Find, then select **Users > Users**.

   b. Next to the owner of the contact record, click **Edit**.

   c. From the General Information section, select a role, such as **CEO**.

   d. Save your changes.

2. Enable the contact and the contact's related account as external partner users.

   Note: The contact must have a standard related account.

   a. From the contact record page, click the account name in Related Accounts.

   b. Select **Manage External User > Enable User**

   c. From the New User page, in the General Information section, select the following:

   User License

   - Client Customer Community
   - Client Customer Community Plus
   - Client Customer Community Login
   - Client Customer Community Plus Login

   Profile

   - Client Customer Community
   - Client Customer Community Plus
   - Client Customer Community Login
   - Client Customer Community Plus Login

   Note: Community user licenses and profiles are used in Experience Cloud sites.

   d. Save your changes.

   e. From the contact record page, select **Manage External User > Enable User**

   f. From the New User page, in the General Information section, select the following:

User License

- Client Customer Community
- Client Customer Community Plus
- Client Customer Community Login
- Client Customer Community Plus Login

Profile

- Client Customer Community
- Client Customer Community Plus
- Client Customer Community Login
- Client Customer Community Plus Login

> **Note:** Community user licenses and profiles are used in Experience Cloud sites.

    g. Save your changes

3. Assign a permission set:

    a. From the contact's user page, click **Permission Set Assignments** and then click **Edit Assignments**.

    b. From Available Permission Sets, select **Customer Community Read Only** and then click **Add**.

    c. Save your changes.

      If the site is activated, an email is sent to the customer user with site access information.

Next, you can configure Financial Services Cloud Lightning components in your site with Experience Builder.

Deploy CRM Analytics for Financial Services

CRM Analytics for Financial Services gives financial advisors and personal bankers a comprehensive customer intelligence solution based on the CRM Analytics platform. It includes Einstein Discovery, which lets you create automated AI models on any dataset without writing code.

> **Note:** Analytics for Financial Services is available at an additional cost for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (Analytics for Financial Services) license. It requires that you've deployed the Financial Services data model.

The Analytics for Financial Services suite provides a range of solutions that enable the full capabilities of CRM Analytics. With advanced, curated visualizations that highlight key performance indicators (KPIs), advisors, and personal bankers can stay on top of client goals and satisfaction, leads, and referrals. And managers can quickly review and evaluate individual and regional performance.

- Analytics for Wealth Management is a comprehensive analytics solution. Its extensive sets of dashboards apply the power of CRM Analytics to all significant data and KPIs from the Financial Services Cloud. Unique collections of dashboards—one set for advisors and personal bankers, another for managers and executives—provide everyone on the team with necessary insights for business growth.

- Predict Client Churn Risk for Wealth Management Analytics allows advisors to intelligently predict customer churn. Using the power of Einstein Discovery, the app prescribes corrective actions to help minimize occurrences of churn.

- Predict Likelihood to Add Assets for Wealth Management Analytics intelligently predicts the likelihood of advisors adding assets to accounts. Using the power of Einstein Discovery, the app prescribes actions on how to increase the chances to grow your account assets.

- Analytics for Insurance powers agents with practical insights on their sales performance and enables them to be more efficient in sales execution. App visualizations segment the customer base and provide insights on upsell/cross-sell opportunities so agents can grow their written premiums. Managers get insights on their team's performance and what makes the top performers different so that they can coach their team members.

- Einstein Discovery for Insurance Analytics gives you predictions on the likelihood of policy renewals.

- Insurance Claims and Policy Analytics enables claim handlers and producers to effectively manage their tasks, claims, quotes, and policies.

- Consumer Banking Starter Analytics also gives you a quick start on your analytics journey.

- Wealth Starter Analytics gets you quickly started with its My Book of Business dashboard. Advisors can use it to help deepen client relationships and increase assets under management (AUM).

- Analytics for Mortgage enables loan officers and managers to drive increased mortgage sales by helping prioritize the customer leads and mortgage applications to focus on. Measure and monitor your loan application volume, loan amounts, and loan application completion rate to quickly identify bottlenecks concerning opportunities, missing documents, and financial accounts. Analyze your loan applications to quickly process them through the loan pipeline and drive customer satisfaction by prioritizing applications. Gain visibility into who is processing loans faster, who has the highest volume loans, and who has more pending applications.

To learn which one is right for you, see Use Financial Services Cloud CRM Analytics Solutions.

💡 **Tip:** Follow the steps in the sequence shown to deploy CRM Analytics for Financial Services. If you haven't used CRM Analytics before, learn about it from CRM Analytics help.

Enable CRM Analytics in Financial Services Cloud

Before creating CRM Analytics for Financial Services or the Consumer Banking Starter Analytics or Wealth Starter Analytics apps, enable Tableau CRM in your Salesforce org.

Assign CRM Analytics for Financial Services Administrator Permissions

Enable administrators to create and manage CRM Analytics for Financial Services by assigning the relevant administrator permissions. You can assign administrator permissions using Permission Sets or Permission Set Group.

Grant Permission to the Analytics Integration User

If you use Analytics for Insurance, assign the FSC Analytics Integration permission set to the Analytics Integration User.

Assign CRM Analytics for Financial Services User Permissions

Enable users to view CRM Analytics for Financial Services by assigning the relevant user permissions. You can assign the permissions using Permission Sets or Permission Set Group.

Assign Installed Package License for Insurance Claims and Policy Analytics

Assign the integration user with the Vlocity Insurance license to allow them access to all the fields used in the Insurance Claims and Policy Analytics app.

Get Your Data Ready to Create CRM Analytics for Financial Services Apps

Data in your org has to meet specific requirements before you can create Analytics for Wealth Management, Analytics for Insurance, and Wealth Starter Analytics. Creating Consumer Banking Starter Analytics doesn't require any additional data settings.

Set Field-Level Security to Enable Creation of CRM Analytics for Financial Services Apps

Before creating Analytics for Wealth Management, Analytics for Insurance, Consumer Banking Starter Analytics, or Wealth Starter Analytics, make sure the Analytics Integration User has access to all fields used in the app.

Create and Share CRM Analytics for Financial Services Apps

Follow these general steps to create and share the apps included in CRM Analytics for Financial Services. These include Analytics for Wealth Management, Predict Client Churn Risk for Wealth Management Analytics, Predict Likelihood to Add Assets for Wealth Management Analytics, Analytics for Insurance, Analytics for Retail Banking, Wealth Starter Analytics, Analytics for Mortgage, or Consumer Banking Starter Analytics.

Analytics for Wealth Management includes dashboards intended for embedding and access in Lightning Experience pages.

Analytics for Insurance includes dashboards intended for embedding and access in Lightning Experience pages.

The Analytics for Insurance Claims and Policy Analytics app includes dashboards that you can embed and access in Lightning Experience pages.

The Policy Renewal Prediction app includes the Likelihood of Renew Policy dashboard that you can embed and access in Lightning Experience pages.

When you create CRM Analytics for Financial Services apps, the creation process includes a data sync and dataflows that make data available to dashboards. Schedule the app to refresh daily so dashboards show the latest data.

General Data Protection Regulation (GDPR) requires you to delete customers' personal data when customers request it, or when it's no longer necessary to keep. You can remove customers' data from the Analytics for Insurance app by deleting the records from trending or snapshot datasets.

Give financial advisors, bankers, and branch managers access to analytics that provide a comprehensive view of their business performance. By using a guided setup, quickly set up Revenue Management for Financial Services Cloud.

CRM Analytics for Financial Services provides access to CRM Analytics capabilities and features.

SEE ALSO:

Enable CRM Analytics in Financial Services Cloud

Before creating CRM Analytics for Financial Services or the Consumer Banking Starter Analytics or Wealth Starter Analytics apps, enable Tableau CRM in your Salesforce org.

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

2. From Setup, enter *Getting Started* in the Quick Find box, and then select **Getting Started**.

3. Click **Enable CRM Analytics**.

SEE ALSO:

Assign CRM Analytics for Financial Services Administrator Permissions

Enable administrators to create and manage CRM Analytics for Financial Services by assigning the relevant administrator permissions. You can assign administrator permissions using Permission Sets or Permission Set Group.

Follow these steps to assign the administrators the **Permission Set** to add the relevant permissions set licenses.

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

2. Click the username with the System Administrator profile.

3. Click **Permission Set Assignments**, and then click **Edit Assignments**.

4. Select *both* the CRM Analytics Plus Admin *and* FSC Analytics Admin permission sets.

5. Click **Add**, then click **Save**.

6. Repeat these steps for all users who need to create and manage CRM Analytics for Financial Services.

Follow these steps to assign the administrators the **Permission Set Group** for Financial Service Cloud Analytics to add the relevant permissions set licenses as a single bundle.

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

2. Click the name of the user to whom you want to assign permissions.

3. Click **Permission Set Group Assignments**, and then click **Edit Assignments**.

4. To assign the admin permissions, select **FinanacialServicesAnalytics_Admin_PSG**.

5. Click **Add**, then click **Save**.

Once you assign the permission set group, the following permissions set licenses are added to the user profile:

- CRM Analytics Plus
- Customer Experience Analytics
- Loyalty Analytics
- Financial Service Cloud Analytics

📝 Note: Salesforce recommends using permission set group to assign permissions as it provides role-based access control for managing user entitlements in Salesforce orgs.

Grant Permission to the Analytics Integration User

If you use Analytics for Insurance, assign the FSC Analytics Integration permission set to the Analytics Integration User.

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

2. Select the Analytics Integration User.

3. Go to Permission Set Assignments and then click **Edit Assignments**.

4. Select the **FSC Analytics Integration** permission set.

5. Click **Add**.

6. Save your changes.

Assign CRM Analytics for Financial Services User Permissions

Enable users to view CRM Analytics for Financial Services by assigning the relevant user permissions. You can assign the permissions using Permission Sets or Permission Set Group.

Follow these steps to assign the users the **Permission Set** to add the relevant permissions set licenses.

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

2. Click the name of the user to whom you want to assign permissions.

3. Click **Permission Set Assignments**, and then click **Edit Assignments**.

4. Select *both* the CRM Analytics Plus User *and* FSC Analytics User permission sets.

5. Click **Add**, then click **Save**.

6. Repeat these steps for all users who need to view CRM Analytics for Financial Services.

Follow these steps to assign the users the **Permission Set Group** for Financial Service Cloud Analytics to add the relevant permissions set licenses as a single bundle.

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

2. Click the name of the user to whom you want to assign permissions.

3. Click **Permission Set Group Assignments**, and then click **Edit Assignments**.

4. To assign the user permissions, select **FinanacialServicesAnalytics_User_PSG**.

5. Click **Add**, then click **Save**.

Once you assign the permission set group, the following permissions set licenses are added to the user profile:

- CRM Analytics Plus
- Customer Experience Analytics
- Loyalty Analytics
- Financial Service Cloud Analytics

> **Note:** Salesforce recommends using permission set group to assign permissions as it provides role-based access control for managing user entitlements in Salesforce orgs.

> **Warning:** Users with the CRM Analytics Plus User permission set and Editor or Manager access to CRM Analytics apps can create, edit, and delete app assets.

Assign Installed Package License for Insurance Claims and Policy Analytics

Assign the integration user with the Vlocity Insurance license to allow them access to all the fields used in the Insurance Claims and Policy Analytics app.

1. From Setup, enter `Installed Packages` in the Quick Find box, and then click **Installed Packages**.

2. Look for the Vlocity Insurance package, and click **Manage Licenses**.

3. Click **Add Users**.

4. Select the Integration User, then click **Add**.

5. Save your changes.

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions that have Financial Services Cloud for Insurance enabled

USER PERMISSIONS

To assign permissions to an integration user
- CRM Analytics Plus Admin and FSC Analytics Admin

Get Your Data Ready to Create CRM Analytics for Financial Services Apps

Data in your org has to meet specific requirements before you can create Analytics for Wealth Management, Analytics for Insurance, and Wealth Starter Analytics. Creating Consumer Banking Starter Analytics doesn't require any additional data settings.

CRM Analytics checks your org's data to be sure it meets minimum requirements before creating an app from a template. If it doesn't, you see a message describing what to fix. Here's the data required in your org to be sure you can create an app from the template you want to use.

Analytics for Wealth Management Data Requirements

Your org must have at least one record in each of the following objects to create Analytics for Wealth Management:

- Account
- Campaign
- Event
- FinancialAccount
- FinancialAccountTransaction
- FinancialGoal
- Lead
- LeadHistory
- Opportunity
- OpportunityHistory
- Task

The configuration wizard gives you the option of including lead history in dashboards. If you want to be able to do that, enable lead history in the Lead object.

For earnings and fees metrics to appear in relevant dashboards, you have to import data from an external source. See Import Earnings and Fees Data to CRM Analytics for Financial Services Apps. For quotas metrics to appear in relevant dashboards, you also have to import data from an external source. See Import Quotas Data to the Analytics for Wealth Management App

Analytics for Insurance Data Requirements

Your org must have at least one record in each of these objects.

- Insurance Policy
- Insurance Policy Coverage
- Account
- Event
- Lead
- Producer
- Opportunity
- Product
- Task

In addition, for earnings and fees metrics to appear in relevant dashboards, you have to import data from an external source. See Import Earnings and Fees Data to CRM Analytics for Financial Services Apps.

For orgs with Experience Cloud only:

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- Data about agencies is stored on the Accounts object with a record type Business Account.
- Data about agents is stored in the Contacts field on the Business Account object. Enable agents as Partner Users so they can access Analytics for Insurance through Communities.
- Data about agent managers is stored in the Contacts on the Business Account object. Enable agent managers as Partner Users and assign them the Partner User Manager user role so they can access Analytics for Insurance through Communities.
- Data about sales managers is stored on the User object and make sales managers owners for the Business Accounts (agencies) object.
- The Producer object must include a Contact Lookup field with information about agents and an Account Lookup field with information about agents' agency. Leaderboards in the app's sales manager dashboards consume data from these fields.

Optionally, enable CRM Analytics for Communities if you want to give partners access to Analytics for Insurance:

- Assign users the Insurance Community User permission set. See Grant Users Access to the Portal.
- Enable CRM Analytics for Communities. See Enable CRM Analytics for Communities.

Wealth Starter Analytics Data Requirements

To create an app from the Wealth Starter Analytics template, the User object in your org must include a custom field of type `Text`, with the following attributes:

- Field Label: `FSC_WavePermissions`
- Field Name: `FSC_WavePermissions`
- API name: `FSC_WavePermissions__c`

In addition, to access app datasets, set your org's data security as follows:

- Make sure that you own the records you want to access. For example, for data in the Campaign Member dataset, you must own a campaign to see its campaign members.
- Set the value of the User object FSC_WavePermissions__c field to `View All`. Be sure to capitalize *View All*. Log out of CRM Analytics and log back in to enable the setting.

Import Earnings and Fees Data to CRM Analytics for Financial Services Apps
Follow these steps to add data about earnings and fees from an external source to the Analytics for Wealth Management and Analytics for Insurance apps.

Analytics for Wealth Management Example Earnings and Fees .CSV File
Here's an example of the .CSV file you create to update the Analytics for Wealth Management and Analytics for Insurance earnings and fees datasets.

Import Quotas Data to the Analytics for Wealth Management App
Follow these steps to add quotas data from an external source to the Analytics for Wealth Management app.

Analytics for Wealth Management Example Quota .CSV File
Here's an example of the .CSV file you create to update the Analytics for Wealth Management quotas dataset.

SEE ALSO:

Consumer Banking Starter Analytics Template

Import Earnings and Fees Data to CRM Analytics for Financial Services Apps

Follow these steps to add data about earnings and fees from an external source to the Analytics for Wealth Management and Analytics for Insurance apps.
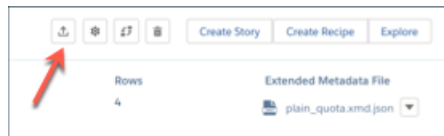
1. Create a .CSV file with these columns (field names), in this order, with these exact names. Column names are case-sensitive:

Name	Contents
product	Names of your financial products, such as Annuity, ETF,and Mutual Fund.
id	A number that's used to identify the fee/earning record.
date	Date of the record in *mm-dd-yy* format.
fees	Amount of the fee for the record.
revenue	Amount of the revenue for the record.
commission	Amount of the commission for the record.
aum	Amount of assets under management (aum) for the record.

For an example, see Analytics for Wealth Management Example Earnings and Fees .CSV File.

> (!) **Important:** Create and open .CSV files using only a UTF-8-compliant text editor. Opening them in Microsoft Excel or other spreadsheet software reformats .CSV files and makes them unusable in CRM Analytics.

2. Save the .CSV file to a location you can easily remember.

3. Create the app according to the instructions provided in Create and Share the Analytics for Wealth Management App or Create and Share the Analytics for Insurance App.

4. Open the app, click Datasets, and locate the earnings and fees dataset.

5. Click the triangle on the far-right side of the screen, and select **Edit**.

6. At the top of the next screen, locate the Replace Data icon, next to the gear, and click it.

7. Click **Select a file or drag it here**, locate the .CSV file you created, select it, and click Open.

8. On the next two screens, click **Next**. Then, click **Upload File** and **Replace**.

The next time the dataflow for your app runs, CRM Analytics adds fees and earnings metrics to relevant dashboards.

Analytics for Wealth Management Example Earnings and Fees .CSV File

Here's an example of the .CSV file you create to update the Analytics for Wealth Management and Analytics for Insurance earnings and fees datasets.

```
product,id,date,fees,revenue,commissions,aum
Annuity,1,2018-04-08,471.47,1266.59,142.1,688051.4
Annuity,2,2018-04-03,333.22,1779.32,634.29,1101404.38
ETF,3,2018-04-29,419.49,766.86,113.81,1150628.79
Life Insurance,4,2018-04-26,498.2,822.17,927.73,462348.11
Life Insurance,5,2018-02-17,450.12,1454.37,63.2,1110180.51
Life Insurance,6,2018-06-10,664.98,1908.04,659.39,1157066.6
Annuity,7,2018-04-12,0,667.34,0,1177799.88
ETF,8,2018-03-09,556.04,1052.64,922.76,919275.15
Mutual Fund,9,2018-06-27,170.19,1878.01,751.38,1140515.99
Mutual Fund,10,2018-02-23,0,1203.79,0,922238.4
Life Insurance,11,2018-01-18,268.01,556.91,392.37,841724.49
Mutual Fund,12,2018-02-04,689.72,1604.4,708.29,1094500.71
ETF,13,2018-02-09,282.24,1565.3,13.46,491790.29
Life Insurance,14,2018-07-12,755.09,809.98,992,598137.15
Life Insurance,15,2018-07-28,503.85,1178.26,177.14,573037.08
Annuity,16,2018-01-03,269.3,816.47,684.57,595944.41
ETF,17,2018-05-21,522.49,1645.45,764.25,440486.76
Annuity,18,2018-04-02,825.27,681.24,802.86,558388.76
Annuity,19,2018-03-12,213.86,1065.97,951.93,550783.13
Savings,20,2018-05-30,487.02,1123.16,508.36,454734.57
Annuity,21,2018-02-09,794.99,1885.09,668.64,606486.9
Life Insurance,22,2018-07-14,297.03,1422.7,49.78,801082.51
ETF,23,2018-05-05,969.78,1033.94,681.32,706809.66
Annuity,24,2018-05-24,172.19,1334.47,475.32,551905.53
ETF,25,2018-03-22,462.21,1793.9,64.15,1171338.12
Life Insurance,26,2018-04-18,772.53,783.78,974.62,1063116.75
Mutual Fund,27,2018-01-28,902.16,924.42,613.41,908242.05
ETF,28,2018-04-10,793.34,914,728.2,660987.47
```

Import Quotas Data to the Analytics for Wealth Management App

Follow these steps to add quotas data from an external source to the Analytics for Wealth Management app.

1. Create a .CSV file with these fields, in this order, with exactly these names. Field names are case-sensitive:

    a. StartDate (in yyyy-mm-dd format)

    b. QuotaAmount

    c. OwnerName

    d. Username

    For an example, see Analytics for Wealth Management Example Quota .CSV File.

    🛑 **Important:** Create and open .CSV files using only a UTF-8-compliant text editor. Opening them in Microsoft Excel or other spreadsheet software reformats .CSV files and makes them unusable in CRM Analytics.

2. Save the .CSV file to a location you can easily remember.

3. Create the app according to the instructions provided in Create and Share the Analytics for Wealth Management App.

4. Open the app, click Datasets, and locate the quotas dataset.

5. Click the triangle on the far-right side of the screen, and select **Edit**.

6. At the top of the next screen, locate the Replace Data icon, next to the gear, and click it.

7. Click **Select a file or drag it here**, locate the .CSV file you created, select it, and click Open.

8. On the next two screens, click **Next**. Then, click **Upload File** and **Replace**.

The next time the dataflow for your app runs, CRM Analytics adds fees and earnings metrics to relevant dashboards.

Analytics for Wealth Management Example Quota .CSV File

Here's an example of the .CSV file you create to update the Analytics for Wealth Management quotas dataset.

📝 Note: This file is for example purposes only. Create a unique .CSV file with quota data for members of your team including the following fields:

- QuotaAmount
- StartDate
- OwnerName
- Username

Save the .CSV file in UTF-8 format. Field names are case-sensitive and must appear in your file exactly as shown here.

🚫 Important: Do not open the .CSV file with Microsoft Excel or another spreadsheet application, which can corrupt the file format.

👁 Example:

```
QuotaAmount,StartDate,OwnerName,Username
150000,2016-01-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-02-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-03-01,Chris Riley,trailhead9.ub20k5i9t8ou@example.com
150000,2016-01-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-02-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-03-01,Harold Campbell,trailhead14.jibpbwvuy67t@example.com
150000,2016-01-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
150000,2016-02-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
150000,2016-03-01,Jessica Nichols,trailhead19.d1fxj2goytkp@example.com
150000,2016-01-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-02-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-03-01,Catherine Brown,trailhead16.kojyepokybge@example.com
150000,2016-01-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-02-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-03-01,Kelly Frazier,trailhead7.zdcsy4ax10mr@example.com
150000,2016-01-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
150000,2016-02-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
150000,2016-03-01,Dennis Howard,trailhead4.wfokpckfroxp@example.com
```

Set Field-Level Security to Enable Creation of CRM Analytics for Financial Services Apps

Before creating Analytics for Wealth Management, Analytics for Insurance, Consumer Banking Starter Analytics, or Wealth Starter Analytics, make sure the Analytics Integration User has access to all fields used in the app.

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

Follow these steps in Lightning Experience.

1. In Setup, enter `object` in the Quick Find box, and click **Enter**.

2. Select **Object Manager**.

3. Enter the name of the object whose field-level security you need to edit in the Quick Find box, and click **Enter**.

4. Select the object you need to edit, then select **Fields & Relationships**.

5. Select the field you need to edit, then select **Set Field-Level Security**.

6. Look for the Analytics Cloud Integration User, check the boxes for the required fields under Visible, and click **Save**.

7. Repeat steps 5 and 6 for all fields you want to use.

8. Refresh your browser cache.

Follow these steps in Salesforce Classic.

1. In Setup, enter the name of the object whose field-level security you need to edit in the Quick Find box and click **Enter**.

2. Click the name of the object.

3. The next window shows all the fields for the object. Go to the one(s) where you need to edit field-level security.

4. Look for the Analytics Cloud Integration User, check the boxes for the required fields under Visible, and click **Save**.

5. Repeat steps 2 through 5 for all objects with fields you want to use.Refresh your browser cache.

Create and Share CRM Analytics for Financial Services Apps

Follow these general steps to create and share the apps included in CRM Analytics for Financial Services. These include Analytics for Wealth Management, Predict Client Churn Risk for Wealth Management Analytics, Predict Likelihood to Add Assets for Wealth Management Analytics, Analytics for Insurance, Analytics for Retail Banking, Wealth Starter Analytics, Analytics for Mortgage, or Consumer Banking Starter Analytics.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Select the template for the app you want to create:

   > Note: The configuration wizard for some CRM Analytics for Financial Services templates let you customize your app by answering one or more questions. See the links below for details.

   - **Analytics for Wealth Management**. To create and share this app, see Create and Share the Analytics for Wealth Management App.

   - **Predict Client Churn Risk for Wealth Management Analytics**. To create and share this app, see Create and Share the Predict Client Churn Risk for Wealth Management Analytics App.

   - **Predict Likelihood to Add Assets for Wealth Management Analytics**. To create and share this app, see Create and Share the Predict Client Churn Risk for Wealth Management Analytics App.

   - **Analytics for Insurance**. To create and share this app, see Create and Share the Analytics for Insurance App.

- **Einstein Discovery for Insurance Analytics**. To create and share this app, see Create and Share the Einstein Discovery for Insurance Analytics App
- **Analytics for Retail Banking**
- **Wealth Starter Analytics**
- **Analytics for Mortgage**
- **Consumer Banking Starter Analytics**

Then click **Continue**.

> Note: Analytics for Wealth Management was called CRM Analytics for Financial Services until the Winter '20 Salesforce release.

4. Have a quick look at the template preview page, then click **Continue** to open the configuration wizard.

5. CRM 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 If it completes successfully, click **Looks good, next**.

> Important: The Analytics for Mortgage and Consumer Banking Starter Analytics templates include a wizard with a single question. It asks if you'd like to enable Salesforce data security settings so app users can view only records they own. It's recommended that you leave the default answer — **No** — so that all users can view all records. If you'd prefer to limit users to viewing only the data from records they own, select **Yes**.

6. Name your app something you and users can easily remember and click **Create**.

> Note: We recommend using the template name—for example, *Wealth Management*—in your app name to make it easier to find.

7. View the status of app creation on the next page. The process takes a minute or two. Once it's complete, refresh the page to see your app.

> Note: You may see an error saying the Analytics Integration User does not have access to selected fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2. Click the Share icon [icon] at upper right.

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

> Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Create and Share the Analytics for Insurance App

Create an app from the Analytics for Insurance template and share it with your users.

Create and Share the Policy Renewal Prediction App

Perform these steps to create and share an app using the Policy Renewal Prediction template.

SEE ALSO:

Set Field-Level Security to Enable Creation of CRM Analytics for Financial Services Apps

Create and Share the Analytics for Insurance App

Create an app from the Analytics for Insurance template and share it with your users.

> **Note:** Before you create the app, make sure that person accounts are enabled in your org. If they're not enabled, direct your admin to Configure Person Accounts in Financial Services Cloud.

1. Navigate to **CRM Analytics Studio**.

2. Click **Create**, then select **App**.

3. Select **Analytics for Insurance**, then click **Continue**.

4. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.

5. To create an app or use settings from an existing app, make a selection, and click **Continue**.

6. CRM Analytics performs a compatibility check of your Salesforce org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes the check successfully, click **Looks good, next**.

7. The next page of the wizard asks you to make three selections.

   a. The first wizard question asks how you want CRM Analytics to store data in app datasets. To capture all data from the Insurance Policy object one time each week, select **Snapshot**. The snapshot option results in better performance but consumes more data storage space. It also shows data starting from the weekly snapshot date and not from policy effective dates. To capture only changes made to the Insurance Policy object, select **Incremental**. The incremental option results in optimal use of data storage space, and dashboards show data starting from the policy effective date. But overall performance can be slower.

   b. Next, the wizard asks you to select a security predicate to apply to the data. To make data visible to a user based on their hierarchical role and the policies they sold, select **User Role Hierarchy**. To let a user view data that belongs to users below them in the hierarchy and the policies they sold, select **User Manager Hierarchy**. To make all data visible to anyone viewing the app, select **None**.

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.

USER PERMISSIONS

To create the Analytics for Insurance app
- CRM Analytics Plus Admin and FSC Analytics Admin

    c. The next wizard question asks if you want to include lead history data in your dashboards. To include it, you must enable field history tracking for the following Lead object fields: Lead Status, Name, Lead Owner, Lead Source, and Product Interest.

8. The next page of the wizard asks you to make these selections.

    a. The first wizard question asks if you want to include household data in your app. To include household data in your app, select **Yes**.

    b. Next, the wizard asks if you want to calculate loss ratio based on financial account transactions instead of policy claims. To see insights based on loss ratio, select **Yes**.

> 📝 Note: If there's no data in the Financial Account Transaction object, you see insights based on Claims to Gross Written Premium (GWP) instead of Loss Ratio in your dashboards.

    c. Next, the wizard asks if you want to filter activities by date. To see data of tasks and events that occurred on or after a particular date, select **Yes**. To see data of all tasks and events, select **No**.

> 📝 Note: If you're not filtering activities by date, skip to Step 9.

    d. Next, select the date for filtering activities.

9. Click **Looks good, next**.

10. Name your app, then click **Create**.

View the status of the app creation on the next page. The process takes a minute or two. After it's complete, refresh the page to see your app.

> 📝 Note: If you see an error message that the Analytics Integration User doesn't have access to selected fields, edit Salesforce field-level security .

Share the app with your users. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2.
Click the Share icon [icon] at upper right.

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

> ⛔ Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

> 📝 Note: You can delete customers' data from the Analytics for Insurance app by deleting records from the trending and snapshot datasets. See Delete Records from Analytics for Insurance Datasets on page 686.

Create and Share the Policy Renewal Prediction App

Perform these steps to create and share an app using the Policy Renewal Prediction template.

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions where Financial Services Cloud for Insurance is enabled and Vlocity Insurance is installed

1. Go to Analytics Studio.

2. Click **Create**, and then select **App**.

3. Select **Policy Renewal Prediction**, and then click **Continue**.

4. Take a quick look at the template preview page, and then click **Continue**.

   CRM Analytics performs a compatibility check of your org's data and, if any errors are found, shows error messages with instructions on how to fix them.

5. If issues are found, fix the issues, and then try to create the app again.

6. If the data check is completed without any issues, click **Looks good, next**.

7. Select the period of Einstein Discovery to aggregate data and train the predictive model, and then click **Looks good, next**.

8. Select the fields with data that can improve the prediction, and then click **Looks good, next**.

   By default, Analytics selects commonly used fields.

9. Name your app, and then click **Create**.

10. To see the status of app creation, go to the next page.

    The process takes a minute or two.

11. After the app is created, to see your app, refresh the page.

    Note: If you see an error that the Analytics Integration User doesn't have access to selected fields, edit Salesforce field-level security to give the Integration User the required access.

Now that you've created the app, share the app with users in your company.

You can share the app only with Vlocity users who are assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. If you navigated away from CRM Analytics Studio, return to it, select **All Items**, and then find your app.

2. Open your app.

3. Click the **Share** icon.

4. Find other users in your org by using the search field under **Invite others:**.

5. Select a role for the selected user: Viewer, Editor, or Manager.

6. Click **Add**, and then save your changes.

Create and Share the FSC Insurance Analytics Fast Start App

Create an app from the FSC Insurance Analytics Fast Start template and then share the app with your users.

📝 **Note:** To create FSC Insurance Analytics Fast Start, you don't need additional data settings. FSC Insurance Analytics Fast Start app template is automatically installed in Salesforce instances via managed packages. For more information, see Auto-Installed Apps.

Before you create the app, make sure that person accounts are enabled in Salesforce. If not enabled, get your admin to Configure Person Accounts in Financial Services Cloud.

1. To create the app, go to **CRM Analytics Studio**.

2. Click **Create**, and then select **App**.

3. Select **FSC Insurance Analytics Fast Start**, and then click **Continue**.

4. Review the preview page, and then, to open the configuration setup flow, click **Continue**.

5. Choose whether to create an app or use settings from an existing app, and then click **Continue**.

   CRM Analytics performs a compatibility check of your instance's data.

6. Perform an action:

   - If the instance's compatibility check fails, perform the instructions in the error message to fix the issues, and then create the app again.

   - If the instance's compatibility check succeeds, click **Looks good, next**.

7. Select a security level for the data.

   - To make the data visible to a user based on the user's hierarchical role and the policies that the user sold, select **User Role Hierarchy**.

   - To let a user view the data that belongs to users below them in the hierarchy and the policies the user sold, select **User Manager Hierarchy**.

   - To make all data visible to anyone viewing the app, select **None**.

8. Click **Looks good, next**.

9. Enter a name for your app, and then click **Create**.

   You can see the status of the app creation on the next page. The process takes a minute or two.

10. After the process is completed, to see your app, refresh the page.

    If you see an error message that the Analytics Integration User doesn't have access to selected fields, edit Salesforce field-level security.

11. To share the app with your users, in CRM Analytics Studio, open your app.

    You can share the app only with users who have the relevant admin or user permission set.

12. Click the Share icon.

13. To find other users in your instance, search under Invite others: by using the search field.

14. Select a role for the selected user: Viewer, Editor, or Manager.

    📝 **Note:** Users with the Use Analytics Templated Apps permissions and the Editor or Manager access can create, edit, and delete assets in the app.

15. Click **Add**, and then save your changes.

Create and Share the Einstein Discovery for Insurance Analytics App

Create an app from the Einstein Discovery for Insurance Analytics template and share it with your users.

⊘ **Important:** You can create the Einstein Discovery for Insurance Analytics App only if the Financial Services Cloud managed package is installed in your Salesforce org.

☑ **Note:** \To successfully create the Einstein Discovery for Insurance Analytics app, make sure that the Insurance Policy object meets these requirements.

- At least 25 records with a renewal date in the past, and either the Date Renewed field or the Previous Renewal Date field contains a value.
- At least 25 records with a renewal date in the past, and both Date Renewed and Previous Renewal Date fields are empty.

1. Navigate to CRM Analytics Studio.

2. Click **Create**, then select **App**.

3. Select **Einstein Discovery for Insurance Analytics**, then click **Continue**.

4. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.

5. CRM Analytics performs a compatibility check of your Salesforce org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click **Looks good, next**.

6. Select the fields that you want to add to your app. Select at least two fields with data that can improve the predictions.

   ☑ **Note:** Fields such as Age Group, State, or Gender can introduce bias into the analysis. We don't recommend selecting them.

7. Click **Looks good, next**.

8. Name your app, then click **Create**.

   View the status of the app creation on the next screen. The process takes a minute or two. After it's complete, refresh the page to see your app.

   ☑ **Note:** If you see an error that the Analytics Integration User doesn't have access to selected fields, edit Salesforce field-level security .

Share the app with your users. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM 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.

   ⊘ **Important:** Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

If you want to restrict users' access to data based on their hierarchical role or Manager Id, apply security predicates to the relevant datasets.

To retrain a predictive scoring model, update and run the dataflow, refresh the story, and deploy the model.

Apply Security Predicates to Your Datasets

If you want to restrict users' access to data based on their hierarchical role or Manager Id, apply security predicates to the relevant datasets.

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.

1. In CRM Analytics Studio, click ⚙ and select **Data Manager**.

2. Select **Data**.

3. Under Datasets, look for the dataset you want to apply predicates to, and click ▼ .

4. Select **Edit Dataset**.

5. Under Security Predicate, click ✏.

6. In the text box, enter either of these strings:

- To apply User Role Hierarchy to the dataset, enter

```
'OwnerId' == "$User.Id" || 'Owner.Role.Roles' == "$User.UserRoleId"
```

- To apply User Manager Hierarchy to the dataset, enter

```
'Owner.Managers' == "$User.Id"
```

If you want to retrain the predictive scoring model, remove the security predicates, update your story, and deploy your new model. If you retrain your model without removing the security predicates, the model is trained only with the data the user can access.

Retrain Your Predictive Model

To retrain a predictive scoring model, update and run the dataflow, refresh the story, and deploy the model.

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.

1. From CRM Analytics Studio, click ⚙ and select **Data Manager**.

2. Select **Dataflows & Recipes**.

3. Under DATAFLOWS, look for the dataflow you want to edit, and click ▼

4. Select **Edit**.

5. In the dataflow editor, replace the scoring filter node with your training filter node. Use the `RenewedFlag=="True"` SAQL filter as your training dataset filter node attribute. To learn more about adding filters to a dataset, see Filter Transformation.

6. Run the dataflow.

7. After the dataflow is completed, refresh the Analytics home page and select the Stories subtab.

8. Click the story you want to open.

9. Einstein Discovery asks whether you want to refresh your story with the latest data. Click **Refresh field options from latest version**.

10. After the story is updated, open it.

11. From the Edit Story dropdown menu, select **Deploy Model**.

Create and Share the Insurance Claims and Policy Analytics App

Create an app from the Insurance Claims and Policy Analytics template and share it with your users.

1. In CRM Analytics Studio, click **Create** and then select **App**.

2. Select the **Insurance Claims and Policy Analytics** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. To create an app or use settings from an existing app, make a selection, and click **Continue**. Analytics runs a compatibility check of the data in your Salesforce org.

5. If the compatibility check uncovers any issues, follow the instructions in the error message to resolve them. Then, try to create the app again. When the compatibility check completes successfully, click **Looks good, next**.

6. Select the type of data that you want to include in your app:

- To add claims management data, select **Claims Management**.
- To add policy administration data, select **Policy Administration**.

7. Select the security predicate that you'd like to apply to your app:

- To make data visible to a user based on their hierarchical role, select **User Role Hierarchy**.
- To let a user view data that belongs to users below them in the hierarchy, select **User Manager Hierarchy**.
- To make all data visible to anyone viewing the app, select **None**.

8. Select a currency for your app. By default, your Salesforce org's currency is selected.

9. Click **Looks good, next**.

10. Name your app, then click **Create**.
The process takes a few minutes. When it completes, refresh the page.

📝 Note: If you see an error saying the Analytics Integration User doesn't have access to selected fields, update the field-level security for the app. See Set Field-Level Security to Enable Creation of CRM Analytics for Financial Services Apps on page 672. For more information about FLS, see Field-Level Security in Salesforce Help.

Now, share the app with your users. You can share it only with users who are assigned the admin or user permission sets for CRM Analytics for Financial Services.

1.
In CRM Analytics Studio, open your app and click ⬆.

2. On the Give Access tab of the share window, under Invite others, add the names of users in your org.

3. For every user you add, select their level of access: Viewer, Editor, or Manager.

4. Save your changes.

Create and Share the Analytics for Wealth Management App

Follow these steps to create and share an app from the Analytics for Wealth Management template.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Select **Analytics for Wealth Management**. Then click **Continue**.

4. Have a quick look at the template preview page, then click **Looks good, next** to open the configuration wizard.

5. If you've already created an app, the wizard asks if you want to create a new app or reuse answers from an existing app. Make your selection, and click **Continue**.

6. CRM 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. If it completes successfully, click **Looks good, next**.

7. The next page of the wizard (labeled *Step 2 of 3*) asks you to make three selections. After you're done, click **Looks good, next**.

    a. **Would you like to add a security predicate to datasets?** If you answer **Yes**, only a record's owner or by someone in a role with permission to view the record can view the data. If you answer **No**, everyone viewing app dashboards can see all data.

    b. **Would you like the app to include trending data and visualizations?** If you select **Yes**, CRM Analytics adds snapshot datasets and shows trending visualizations in dashboards. If you select **No**, dashboards won't show trending. If you have large numbers of records in objects, the number of rows in the snapshot datasets can grow quickly. Those rows count against your data limit. See Understand CRM Analytics for Financial Services Limitations

    c. **Choose the record types used to determine household accounts as well as person or individual accounts.** Your app datasets and dashboard include only accounts with the record types you select. CRM Analytics recommends record types to use. Add others or take away types you don't want to use.

8. The next page (labeled *Step 3 of 3*) asks you to make four more selections. After you're done, click **Looks good, next**.

    a. **Would you like to include commissions and fees charts in dashboards?** If you answer **Yes**, you have to upload commissions and fees data from an external source to populate dashboard charts. See Import Earnings and Fees Data to CRM Analytics for Financial Services Apps on page 669.

    b. **Would you like to include quotas charts in dashboards?** If you answer **Yes**, you have to upload quotas data from an external source to populate dashboard charts. See Import Quotas Data to the Analytics for Wealth Management App on page 670.

    c. **Would you like to include lead history charts in dashboards?** If you answer **Yes**, be sure you've enabled lead history in the Leads object.

    d. **Would you like to include financial account transactions charts in dashboards?** If you answer **Yes**, you must have already uploaded financial account transaction data from an external source to populate the charts.

9. Name your app and click **Create**.

10. View the status of app creation on the next page. The process takes a minute or two. Once it's complete, refresh the page to see your app.

    📝 Note: You may see an error saying the Analytics Integration User does not have access to selected fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM 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.

Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Create and Share the Predict Client Churn Risk for Wealth Management Analytics App

Follow these steps to create and share an app from the Predict Client Churn Risk for Wealth Management Analytics template.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Select **Predict Client Churn Risk for Wealth Management Analytics**. Then click **Continue**.

4. Have a quick look at the template preview page, then click **Looks good, next** to open the configuration wizard.

5. If you've already created an app, the wizard asks if you want to create a new app or reuse answers from an existing app. Make your selection, and click **Continue**.

6. CRM 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. If it completes successfully, click **Looks good, next**.

7. The next page of the wizard (labeled *Step 2 of 2*) asks you to make three selections. After you're done, click **Looks good, next**.

   a. **Choose the record types used to determine household accounts as well as person or individual accounts.** Your app datasets and dashboard include only accounts with the record types you select. CRM Analytics recommends record types to use. Add others or take away types you don't want to use.

   b. **Choose the record types of financial accounts to include.** Your app datasets and dashboard include only financial accounts with the record types you select. Analytics recommends record types to use. Add others or take away types you don't want to use.

   c. **Would you like to include financial account transactions in the app?** If you select **Yes**, CRM Analytics adds financial account transactions in the dataset and as part of the Einstein Discovery story. You must have already uploaded financial account transaction data from an external source to be used by Einstein Discovery. If you select **No**, financial account transactions aren't used.

8. Name your app and click **Create**.

9. View the status of app creation on the next page. The process takes a minute or two. Once it's complete, refresh the page to see your app.

   Note: You may see an error saying the Analytics Integration User does not have access to fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2. Click the Share icon ![share icon] at upper right.

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

   Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Create and Share the Predict Likelihood to Add Assets for Wealth Management Analytics App

Follow these steps to create and share an app from the Predict Likelihood to Add Assets for Wealth Management Analytics template.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Select **Predict Likelihood to Add Assets for Wealth Management Analytics**. Then click **Continue**.

4. Have a quick look at the template preview page, then click **Looks good, next** to open the configuration wizard.

5. If you've already created an app, the wizard asks if you want to create a new app or reuse answers from an existing app. Make your selection, and click **Continue**.

6. Select a version of the Analytics for Wealth Management app you want to use to populate your data for this app. If you have not created an Analytics for Wealth Management yet, see Create and Share the Analytics for Wealth Management App and then try app creation again. Select the Analytics for Wealth Management app you want and click **Looks good, next**.

7. CRM 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. If it completes successfully, click **Looks good, next**.

8. The next page of the wizard (labeled *Step 3 of 3*) asks you to make one selection. After you're done, click **Looks good, next**.

    a. **Enter threshold for AUM Change calculation for Assets addition flag.** Enter a numeric value between 1–10000000 to set the threshold of AUM change for the Einstein Discovery story model. The default value is 10000.

9. Name your app and click **Create**.

10. View the status of app creation on the next page. The process takes a minute or two. Once it's complete, refresh the page to see your app.

> 📝 Note: You may see an error saying the Analytics Integration User does not have access to selected fields. If so, edit Salesforce field-level security so the Integration User has the required access.

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for CRM Analytics for Financial Services.

1. Open your app if it's not already open. If you've navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2. Click the Share icon [icon] at upper right.

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

> ⛔ Important: Users with the "Use Analytics Templated Apps" permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click **Add**, then click **Save**.

Embed Analytics for Wealth Management Dashboards in Lightning Pages

Analytics for Wealth Management includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see Embed Dashboards in Lightning Pages in Salesforce Help. Here are examples using dashboards from the Analytics for Wealth Management app, including the code for the filter attribute set in Step 4 of Embed Dashboards in Lightning Pages.

Financial Advisor Home. Intended for access through your Financial Services Cloud home page, but can be embedded anywhere you want to show data insights.

Financial Account. Embed in a financial accounts record page. Set the Filter attribute with the following:

```
{'datasets':{'FSC_FinancialAccount':[{'fields':['Id'], 'filter':{'operator': 'in',
'values':['$Id']}}]}}
```

Goal. Embed in a financial goals record page. Set the Filter attribute with the following:

```
{'datasets':{'FSC_FinancialGoal':[{'fields':['Id'], 'filter':{'operator': 'in',
'values':['$Id']}}]}}
```

Lead & Referral. Embed in a lead or referral record page. Set the Filter attribute with the following:

```
{'datasets':{'FSC_Lead':[{'fields':['Id'], 'filter':{'operator': 'in', 'values':['$Id']}}]}}
```

Opportunity. Embed in a product record page. Set the Filter attribute with the following:

```
{'datasets':{'FSC_Opportunity':[{'fields':['Id'], 'filter':{'operator': 'in',
'values':['$Id']}}]}}
```

Embed Analytics for Insurance Dashboards in Lightning Pages

Analytics for Insurance includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see Embed Dashboards in Lightning Pages in Salesforce Help. Here are examples using dashboards from the Analytics for Insurance app, including the code for the filter attribute set in Step 4 of Embed Dashboards in Lightning Pages.

Book of Business. Embed in Account or Contact record page layouts. Set the Filter attribute with the following:

```
{"datasets": {"FinancialAccountTransaction": [{"fields": ["Producer.Account.Id"],"filter":
 {"operator": "in","values": ["$Id"]}}],"Insurance_Policies": [{"fields":
["Producer.Account.Id"],"filter": {"operator": "in","values": ["$Id"]}}],"Claims":
[{"fields": ["Producer.Account.Id"],"filter": {"operator": "in","values": ["$Id"]}}]}}
```

Customer: Embed in an Account record page layout. Set the Filter attribute with the following:

```
{"datasets": {"Insurance_Policies": [{"fields": ["PolicyOwner.Id"],"filter": {"operator":
 "in","values": ["$Id"]}}]}}
```

Distributor Book of Business. Intended for access through your sales manager home page, but can be embedded anywhere you want to show data insights. No filter required.

Distributor Sales Performance. Embed in Account or Contact record page layouts. Set the Filter attribute with the following:

```
{"datasets": {"FinancialAccountTransaction": [{"fields": ["Producer.Account.Id"],"filter":
 {"operator": "in","values": ["$Id"]}}],"Insurance_Policies": [{"fields":
["Producer.Account.Id"],"filter": {"operator": "in","values": ["$Id"]}}],"Claims":
[{"fields": ["Producer.Account.Id"],"filter": {"operator": "in","values":
["$Id"]}}],"AllActivities1": [{"fields": ["Account.Id"],"filter": {"operator": "in","values":
 ["$Id"]}}]}}
```

Key Distributors. Intended for access through your sales manager home page, but can be embedded anywhere you want to show data insights. No filter required

Lead. Embed in a Lead record page layout. Set the Filter attribute with the following:

```
{"datasets": {"AllLeads": [{"fields": ["Id"],"filter": {"operator": "in","values":
["$Id"]}}]}}
```

Opportunity. Embed in an Opportunity record page layout. Set the Filter attribute with the following:

```
{"datasets": {"Opportunity": [{"fields": ["Id"],"filter": {"operator": "in","values":
["$Id"]}}]}}
```

Likelihood to Renew Policy. Embed in an Account page layout. Set the Filter attribute with the following:

```
{"datasets":{"ED_LikelihoodToRenewPolicy":[{"fields":["NameInsuredId"],"filter":{"operator":"in","values":["$Id"]},"locked":null,"hidden":null}]}}
```

Household. Embed in an Account page layout. Set the Filter attribute with the following:

```
{"datasets":{"Account_Financials":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]},"locked":null,"hidden":null}]}}
```

Embed Insurance Claims and Policy Analytics Dashboards

The Analytics for Insurance Claims and Policy Analytics app includes dashboards that you can embed and access in Lightning Experience pages.

Dashboard	String
Distributor Sales Performance	{dashVCNShareRtyTeRPoluAcourtRpeod"ueSopkeh"lider"h}
Distributor Book of Business	{dashVCNShareRtyTeRPoluAcourtRpeod"ueSopkeh"lider"h}

For detailed instructions for embedding dashboards, see Embed Dashboards in Lightning Pages in Salesforce Help.

Embed Likelihood of Renew Policy Dashboard in Lightning Pages

The Policy Renewal Prediction app includes the Likelihood of Renew Policy dashboard that you can embed and access in Lightning Experience pages.

Give users quick access to the Likelihood of Renew Policy dashboard by embedding it on Lightning pages in your org.

Table 21: Embed the Dashboard

Dashboard	String
Likelihood of Renew Policy	{task_D_V_Likelihood Renew Policy"Name"value"pa"deSkdehtdien"}

For detailed instructions for embedding dashboards, see Embed Dashboards in Lightning Pages in Salesforce Help.

Schedule the Data Sync and Dataflow for CRM Analytics for Financial Services Apps

When you create CRM Analytics for Financial Services apps, the creation process includes a data sync and dataflows that make data available to dashboards. Schedule the app to refresh daily so dashboards show the latest data.

To schedule your app, see Schedule Data Refresh for a CRM Analytics App. Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

The app refresh runs the sync and dataflows for your app every day at the time you set.

Delete Records from Analytics for Insurance Datasets

General Data Protection Regulation (GDPR) requires you to delete customers' personal data when customers request it, or when it's no longer necessary to keep. You can remove customers' data from the Analytics for Insurance app by deleting the records from trending or snapshot datasets.

✏️ **Note:** Before you delete records, make sure your app's data is synced and it has the latest data.

Delete Records from a Trending Dataset
You can delete a user, contact, or an account from the Analytics for Insurance trending datasets.

Delete Records from a Snapshot Dataset
You can delete a user, contact, or an account from the Analytics for Insurance Snapshot datasets.

Delete Records from a Trending Dataset

You can delete a user, contact, or an account from the Analytics for Insurance trending datasets.

1.
   In CRM Analytics Studio, click ⚙ and then select **Data Manager**.

2. Select **Dataflows & Recipes**.

3.
   Under Dataflows, look for FS_INS_GDPR_Compliance_Dataflow and then click 🔽 .

4. Select **Edit**.

5. Select the filter node and edit the SAQL filter.

6. To delete a user,

   a. Select the **Filter:DeletedUsersTrending** node.

   b. In the SAQL filter string, replace NA with the username of the record you want to delete.

Filter:DeletedUsersTrending: filter ✕

ATTRIBUTES OUTPUT FIELDS

Node Name

Filter:DeletedUsersTrending

Source

["Edgemart:InsurancePolicyTrending"]

☑ Use SAQL

SAQL Filter

'Producer.User.Username' not in ["NA"]

Cancel Save

   c. Save your changes.

7. To delete an account,

   a. Select the **Filter:DeletedAccountsTrending** node.

   b. In the SAQL filter string, replace NA with the ID of the account you want to delete.

Filter:DeletedAccountsTrending: filter   ✕

ATTRIBUTES   OUTPUT FIELDS

Node Name

Filter:DeletedAccountsTrending

Source

["Filter:DeletedUsersTrending"]

☑ Use SAQL

SAQL Filter

'NameInsuredId' not in ["NA"]

Cancel   Save

c. Save your changes.

8. To delete a contact,

a. Select the **Filter:DeletedContactsTrending** node.

b. In the SAQL filter string, replace NA with the ID of the contact you want to delete.

    c. Save your changes.

9. Click **Run Dataflow**.

After the dataflow run completes, open the FS(INS) - Insurance Policy Trending and FS(INS) - Account Trending datasets and verify if the records are deleted.

Delete Records from a Snapshot Dataset

You can delete a user, contact, or an account from the Analytics for Insurance Snapshot datasets.

1. In CRM Analytics Studio, click ⚙ and then select **Data Manager.**

2. Select **Dataflows & Recipes**.

3. Under Dataflows, look for FS_INS_GDPR_Compliance_Dataflow and then click ▼

4. Select **Edit**.

5. Select the filter node and edit the SAQL filter.

6. To delete a user,

   a. Select the **Filter:DeletedUsersSnapshot** node.

   b. In the SAQL filter string, replace NA with the username of the record you want to delete.
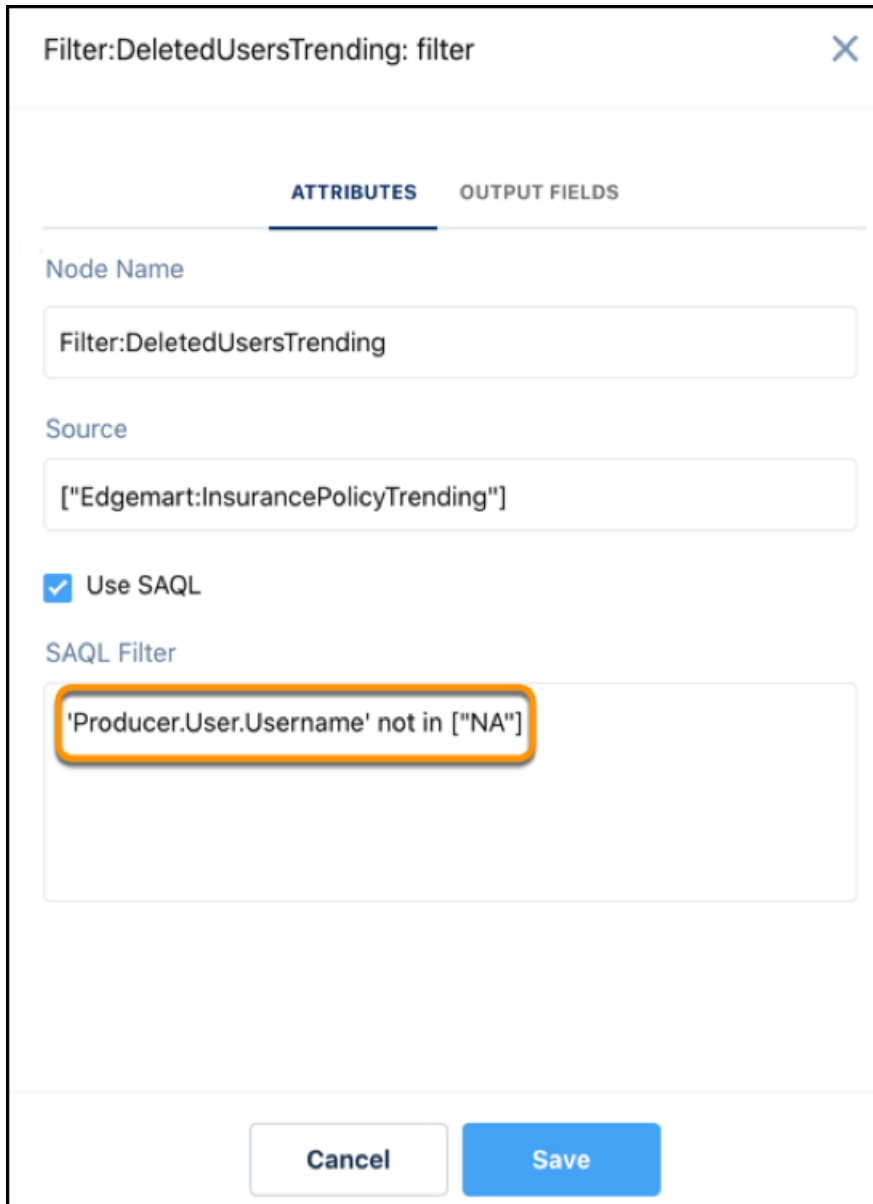
    c. Save your changes.

7. To delete an account,

    a. Select the **Filter:DeletedAccountsSnapshot** node.

    b. In the SAQL filter string, replace NA with the ID of the account you want to delete.

Filter:DeletedAccountsSnapshot: filter   ✕

ATTRIBUTES   OUTPUT FIELDS

Node Name

Filter:DeletedAccountsSnapshot

Source

["Filter:DeletedUsersSnapshot"]

☑ Use SAQL

SAQL Filter

'NameInsuredId' not in ["NA"]

Cancel   **Save**

    c. Save your changes.

8. To delete a contact,

    a. Select the **Filter:DeletedContactsSnapshot** node.

    b. In the SAQL filter string, replace NA with the ID of the contact you want to delete.

  c. Save your changes.

9. Click **Run Dataflow**.

After the dataflow run completes, open the FS(INS) - Insurance Policy - Snapshot and FS(INS) - Account Snapshot datasets and verify if the records are deleted.

Revenue Management

Give financial advisors, bankers, and branch managers access to analytics that provide a comprehensive view of their business performance. By using a guided setup, quickly set up Revenue Management for Financial Services Cloud.

By using a guided setup, you can initiate the request to create a CRM Analytics app for Revenue Management more easily. Follow clear steps to set up permissions, configure the objects and fields that track revenue performance, and initiate a request to create an app with a dashboard for a configuration. Your business users can get valuable insights on revenue by viewing the prebuilt dashboard in the app.

Set Up Revenue Management for Financial Services Cloud

By using a guided setup, you can initiate the request to create a CRM Analytics app for Revenue Management more easily. Follow clear steps to set up permissions, configure the objects and fields that track revenue performance, and initiate a request to create an app with a dashboard for a configuration. Your business users can get valuable insights on revenue by viewing the prebuilt dashboard in the app.

Keep in mind these considerations when setting up Revenue Management for Financial Services Cloud.

Before you set up Revenue Management for Financial Services Cloud, follow these steps.

Select the objects and fields that store opportunity and product-related information. Then initiate a request to create a CRM Analytics app for the configuration.

By creating categories for a revenue metric, you can measure and track the performance of the metric. When creating categories, you can select the fields that store opportunity-related stage information.

After you set up the objects and fields and create at least one active category, you can initiate the request to create a CRM Analytics app for the configuration. You can also preview the app or check the status of the app—all without leaving the guided setup.

Considerations for Setting Up Revenue Management for Financial Services Cloud

Keep in mind these considerations when setting up Revenue Management for Financial Services Cloud.

- Give Analytics Integration users access to all the fields that are used in the app. When you're setting up objects and fields or creating categories, you can see only those fields that the Analytics Integration users have access to.

- To create a CRM Analytics app from the guided setup, the Financial Services Cloud managed package must be installed in your org.

Before You Begin

Before you set up Revenue Management for Financial Services Cloud, follow these steps.

1. From Setup, in the Quick Find box, enter `Revenue Management`, and then select **Revenue Management Setup**.

2. Complete the prerequisites.

   Assign appropriate permissions to users and enable the CRM Analytics setting in your Salesforce org.

   a. To assign permissions, click **Assign Permissions** and assign the necessary permissions to admins.

      To access the Revenue Management Setup page or to create and edit the Revenue Management dashboard, you need the RI for Fins Admin permission set. To view the Revenue Management Dashboards app, you need the RI for Fins Admin or RI for Fins User permission set.

   b. To enable CRM Analytics, click **Enable CRM Analytics Setting**, and then click **Enable CRM Analytics**.

      📝 Note: On the Revenue Management Setup page, you can see the instructions to complete the prerequisites only if you haven't already completed them.

3. To verify the levels of access users have to your Salesforce data, click **Review Role Hierarchy**.

Set Up Revenue Source Objects and Fields for Analytics

Select the objects and fields that store opportunity and product-related information. Then initiate a request to create a CRM Analytics app for the configuration.

1. On the Revenue Management Setup page, from the Configure Objects and Categories step, click **Set Up Objects**.

2. From the Revenue Data Source list, find and select the standard or custom object that stores opportunity information.

3. Provide account and user details.

   a. From the Account Reference list, find and select the field that's a reference (lookup) to the account information.

      If there are multiple accounts, select a field that's a reference to the primary account.

   b. From the User Reference list, find and select the field that's a reference (lookup) to the user ID information of the account owner.

4. To provide the product-related information from the Revenue Data Source selected in step 2, follow these steps:

   a. For Product Source, select **From Revenue Data Source**.

   b. From the Product list, find and select the field from Revenue Data Source that's either a reference (lookup) to the product or the value that represents the product name.

   c. If the Product selected is a reference (lookup) to the product, from the Product Name list, find and select the field that stores the product name.

5. To provide the product-related information from an object other than the Revenue Data Source selected in step 2, follow these steps:

     a. For Product Source, select **From Other Objects**.

     b. From the Product Data Source list, find and select the object that stores both Opportunity and Product details. For example, OpportunityProduct.

     c. From the Revenue Data Source Reference list, find and select the field from the Product Source object that has a reference (lookup) to the Revenue Data Source object.

     d. From the Product list, find and select the field from Revenue Data Source that's either a reference (lookup) to the product or the value that represents the product name.

     e. If the Product selected is a reference (lookup) to the product, from the Product Name list, find and select the field that stores the product name information.

6. Save your changes.

Create Categories for a Revenue Source Metric

By creating categories for a revenue metric, you can measure and track the performance of the metric. When creating categories, you can select the fields that store opportunity-related stage information.

You must set up objects and fields before you create categories.

1. On the Revenue Management Setup page, from the Configure Objects and Categories step, click **Create Categories**.

2. Enter a name for the category.

3. From the Stage Name list, find and select the field from the Revenue Data Source that you selected in the Set Up Objects and Fields step.

4. From the Closed Won Values list, find and select the picklist values that represent the Closed Won stage.

5. From the Closed Lost Values list, find and select the picklist values that represent the Closed Lost stage.

6. From the Close Date list, find and select the field from Revenue Data Source that stores the opportunity close date.

7. From the Revenue list, find and select the field from the Revenue Data Source object that stores the revenue details as either amount or quantity.

In the CRM Analytics app, revenue is aggregated to provide visibility into opportunity performance.

8. To activate and access the category from the analytics dashboard, from the top-right corner of the window, turn on the **Status** toggle.

Initiate App Creation

After you set up the objects and fields and create at least one active category, you can initiate the request to create a CRM Analytics app for the configuration. You can also preview the app or check the status of the app—all without leaving the guided setup.

1. On the Revenue Management Setup page, click **Create App**.

   The app creation takes a while to complete. To get the latest app status, refresh the page.

2. To monitor the app, from Setup, in the Quick Find box, enter `Auto-Installed Apps`, and then select **Auto-Installed Apps**.

3. If an app already exists, and if you want to create an app with new configurations, first delete the existing app.

   a. Set up the objects and fields and create at least one active category.

   > 📝 Note: After you set up objects and fields and create categories, if you modify the Revenue Data Source object in the Set Up Objects and Fields step, the category configuration is cleared.

   b. On the Revenue Management Setup page, from the Delete the Existing App step, click **Delete Existing App**.

   c. To initiate the request to create an app for the new configurations, click **Create App**.

   > 📝 Note: You can delete the app only if you created at least one active category. Deletie can't be undone.

4. After the app is created, to preview the prebuilt dashboard, click **Preview Dashboard.**

5. To launch the app from the App Launcher, find and select **Revenue Management Dashboards**.

Understand CRM Analytics for Financial Services Limitations

CRM Analytics for Financial Services provides access to CRM Analytics capabilities and features.

CRM Analytics for Financial Services gives you the same access to CRM Analytics capabilities as the CRM Analytics Growth and Plus licenses. Consult this chart to see any limitations.

Table 22: CRM Analytics for Financial Services Limitations

Capability	CRM Analytics Growth or Plus; CRM Analytics for Financial Services
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	• CRM Analytics Plus: 10 billion rows • CRM Analytics Growth: 100 million rows
Can customize existing dashboards?	Yes
Can create dashboards?	Yes
Can customize existing datasets?	Yes
Can create datasets?	Yes
Can create custom CRM Analytics apps?	Yes
Supports Einstein Discovery and Community Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein artificial intelligence?	No
Supports Salesforce Inbox?	No

Data Cloud for Financial Services Cloud

Data Cloud for Financial Services Cloud connects and integrates client data to give financial institutions a unified view of their client. It provides you with a number of capabilities to unify and activate data across channels, such as interaction, behavioral, and transactional data.

Note: Before you start, confirm that the Financial Services Cloud (FSC) package is installed and person accounts are configured.

To help you get started, these features enhance the Data Cloud experience:

- Financial Services Cloud data model
- Prebuilt data mappings and data streams from Financial Services Cloud to Data Cloud.
- Calculated insights to learn more about your customers calculate multidimensional metrics such as total monthly expenses and financial account balance net worth.
- Visualized insights show data in FlexCards to understand client income, expenditures, and net worth. The data is based on calculated insights and trends from Data Cloud. Salesforce and Data Cloud must be on the same org to display data on the FlexCards.

Set Up Data Cloud for Financial Services Cloud
Set up and configure Data Cloud for Financial Services Cloud.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Install and Deploy the Financial Services Cloud Data Kit

Publish your data kit from Data Cloud with Package Manager in your Salesforce org.

Connect an External Data Source to Salesforce Data Cloud

To ingest transactional data into Data Cloud, connect your external data source to Data Cloud.

Set Up the Financial Services Cloud Data Kit

Set up and configure the components of the data kit.

Calculate Customer Insights Using Data Cloud

You can use a calculated insight to define and calculate multidimensional metrics on your entire digital state in Data Cloud. You can create metrics at the profile, segment, and population levels.

View Visualized Insights in Salesforce

View calculated insights data in Salesforce using FlexCards. View client transaction data in pre-configured FlexCards that contain clickable actions that change according to the context in which they appear and based on the information that they contain. To display data on the FlexCards, Salesforce and Data Cloud must be on the same org.

Data Cloud for Financial Services Cloud FlexCards and Related Components

The Data Cloud for Financial Services Cloud OmniStudio components display calculated insights data in Salesforce. They let users view client transaction data in pre-configured FlexCards. These components consist of FlexCards and Integration Procedures.

Set Up Data Cloud for Financial Services Cloud

Set up and configure Data Cloud for Financial Services Cloud.

To set up Data Cloud for Financial Services cloud, review and complete these steps in the Salesforce Data Cloud documentation:

1. Get Started.
2. Plan your Data Cloud Strategy.
3. Set Up a Data Cloud Admin User.
4. Turn On Data Cloud.
5. Manage Data Cloud Users.
6. Manage Access with Data Cloud Permission Sets.
7. Data Space Permission Sets.
8. Set Up the Salesforce CRM Connector.

Verify the Financial Services Cloud SSOT Version

Confirm that the Salesforce Standard Data Model SSOT is version 1.29 or above.

Connect Data Cloud to Your Salesforce Org

Connect Data Cloud to your Salesforce CRM org.

Enable Object and Field Permissions for Financial Services Cloud Objects

Add the View All and Read permissions to your Data Cloud Salesforce Connector permission set in your Salesforce org to ingest Financial Services Cloud objects and fields into Data Cloud.

SEE ALSO:

Data Cloud Features

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Data Cloud for Financial Services Cloud:

- Salesforce org: Financial Services Cloud Extension

  AND

  Data Cloud org: Data Cloud Admin

Verify the Financial Services Cloud SSOT Version

Confirm that the Salesforce Standard Data Model SSOT is version 1.29 or above.

1. In Salesforce, in Setup, in the Quick Find box, enter `Installed Packages`, then select **Installed Packages**.

2. Verify that the Salesforce Standard Data Model SSOT is version 1.29 or above.

If the version is less than 1.29, contact your Salesforce account representative.

Connect Data Cloud to Your Salesforce Org

Connect Data Cloud to your Salesforce CRM org.

1. In Data Cloud, click **Data Cloud Setup**.

2. In the Quick Find box, enter `Salesforce CRM`, then click **Salesforce CRM**.

3. Click **New**.

4. Click **Connect** to connect to the Salesforce org that has Data Cloud provisioned.

5. After you connect your Salesforce org, review the connection details. Your Salesforce org is now connected as a data source and data action target.

SEE ALSO:

Set Up a Salesforce Connection in Data Cloud

Enable Object and Field Permissions for Financial Services Cloud Objects

Add the View All and Read permissions to your Data Cloud Salesforce Connector permission set in your Salesforce org to ingest Financial Services Cloud objects and fields into Data Cloud.

1. Log in to the Salesforce org that contains the objects and fields that you want to ingest into Data Cloud.

2. From Salesforce Setup, in the Quick Find box, enter `Permission`, and then select **Permission Sets**.

3. Select the **Data Cloud Salesforce Connector** permission set.

4. Update the System Permissions for Person Life Event object.

   a. From Apps, select **System Permissions**.

   b. Click **Edit**.

   c. Select **Access Insurance Objects** and save your changes.

5. Update the Object Settings for the listed objects.

   a. In Permissions Sets, select the **Data Cloud Salesforce Connector** permission set.

   b. From Apps, select **Object Settings**.

   c. Click the **Account** object to ingest into Data Cloud.

   d. To change object permissions, click **Edit**.

   e. In Object Permissions, enable **Read** and **View All** permissions.

   f. In Field Permissions, enable **Read Access** for each field.

   g. Click **Save**.

   h. Complete these steps for the listed objects.

- Alert
- Assets And Liabilities
- Card
- Contact
- Financial Account
- Financial Account Role
- Financial Goal
- Financial Goal Party
- Financial Holding
- Securities

SEE ALSO:

Enable Object and Field Permissions to Access Salesforce CRM in Data Cloud

Install and Deploy the Financial Services Cloud Data Kit

Publish your data kit from Data Cloud with Package Manager in your Salesforce org.

Install the Financial Services Cloud Data Kit

For access to the Financial Services Cloud DMO Mappings, Data Streams, and Calculated Insights in Data Cloud, install the Financial_Services_Cloud_Data_Bundle data kit

Deploy Financial Services Cloud Data Streams

Create a data stream to connect your Salesforce org to Data Cloud.

Install the Financial Services Cloud Data Kit

For access to the Financial Services Cloud DMO Mappings, Data Streams, and Calculated Insights in Data Cloud, install the Financial_Services_Cloud_Data_Bundle data kit

Ensure that you're logged into the Salesforce org where you want to install the package.

1. Install the Financial Services Cloud Data Kit. You can find the download URL in the Terms and Conditions section of your contract.

2. Paste the URL for the package into your browser navigation bar, and press **Enter**.

3. Enter your Salesforce credentials.

4. Select the audience for the installation. For example, Install for Admins Only.

5. Click **Install**.

   Installation takes a while. You can safely leave this page. You receive an email when installation is complete.

6. To verify that the package was installed, go to Installed Packages in Setup, and look for the name of the package.

SEE ALSO:

Data Kits

Deploy Financial Services Cloud Data Streams

Create a data stream to connect your Salesforce org to Data Cloud.

1. In Data Cloud, click the **Data Streams** tab.

2. Click **New**.

3. Select **Salesforce CRM**, then click **Next**.

4. In Salesforce Org, select **Salesforce.com**.

5. In the Custom Data Bundles, select **Financial_Services_Cloud_Data_Bundle**.

6. Click **Next**.

7. Select a data space.

   By default, all fields from a data kit are deployed. A data kit requires fields with mappings, formula fields, and their source fields to be deployed. To deploy the data kit successfully, add fields to your org.

   Financial Account and Financial Account Role have the same name on the next screen. Note the sequence that the two Data Lake Objects display in this list.

8. Click **Next**.

9. In the **Name** column, update the name of each data stream to the Stream Name in the table.

10. Click **Deploy**.

Stream Name	Stream Source Object Name	Category
Account Data Stream	Account	Profile
Alert Data Stream	Alert	Profile
Assets and Liabilities Data Stream	AssetsAndLiabilities	Profile
Card Data Stream	Card	Profile
Contact Data Stream	Contact	Profile
Financial Account Data Stream	FinancialAccount	Profile
Financial Account Role Data Stream	FinancialAccountRole	Profile
Financial Goal Data Stream	FinancialGoal	Profile
Financial Goal Party Data Stream	FinancialGoalParty	Profile
Financial Holding Data Stream	FinancialHolding	Profile
Person Life Event Data Stream	PersonLifeEvent	Profile
Securities Data Stream	Securities	Profile

Stream Name	Stream Source Object Name	Category
Topic Data Stream	Topic	Profile

SEE ALSO:

Connect an External Data Source to Salesforce Data Cloud

To ingest transactional data into Data Cloud, connect your external data source to Data Cloud.

Ingest client transaction data from your core banking system into Data Cloud. The data model supports raw transaction data from your core banking system, or enriched transaction data from partner MX Technologies.

Depending on the data source there are various prebuilt connectors to bring external data into Data Cloud. Review the Data Cloud documentation and complete the steps to set up and ingest data for transactions.

- Ingestion API
- Data Source Configuration in Data Cloud
- Connect and Ingest Data in Data Cloud
- MuleSoft Anypoint Connector for Salesforce Data Cloud

Map the Financial Account Transaction Data Lake Objects to Data Model Objects

After you connect your external data source to Data Cloud, create connections to map the Financial Account Transaction Data Lake Object (DLOs) and the Financial Account Transaction data model object (DMOs).

Map the Financial Account Transaction Data Lake Objects to Data Model Objects

After you connect your external data source to Data Cloud, create connections to map the Financial Account Transaction Data Lake Object (DLOs) and the Financial Account Transaction data model object (DMOs).

Before you map a data object to a data space, review Data Mapping to understand the requirements and DMO relationships.

Map the Data Lake Objects (DLOs) attributes to the Data Model Objects (DMOs) attributes.

1. In Data Cloud, click the **Data Lake Objects** tab.

2. Click **Financial Account Transaction DLO**.

3. Click **Start** in the mappings section.

4. Select **Financial Account Transaction** on the right side of the screen.

5. Map the fields for each data lake object based on the table.

6. Save your changes.

Data Lake Object Mappings

DLO Name	DLO Attribute	DMO Name	DMO Attribute
Financial Account Transaction DLO	Acquiring Bank Name	Financial Account Transaction	Acquiring Bank Name
Financial Account Transaction DLO	Authorization Record Text	Financial Account Transaction	Authorization Record Text
Financial Account Transaction DLO	Card Scheme Name	Financial Account Transaction	Card Scheme Name
Financial Account Transaction DLO	Cash Flow Type	Financial Account Transaction	Cash Flow Type
Financial Account Transaction DLO	Currency	Financial Account Transaction	Currency
Financial Account Transaction DLO	Description	Financial Account Transaction	Description
Financial Account Transaction DLO	Financial Account ID	Financial Account Transaction	Financial Account ID
Financial Account Transaction DLO	Financial Account Transaction Status	Financial Account Transaction	Financial Account Transaction Status
Financial Account Transaction DLO	Financial Account Transaction Type	Financial Account Transaction	Financial Account Transaction Type
Financial Account Transaction DLO	Forex Conversion Charge Amount	Financial Account Transaction	Forex Conversion Charge Amount
Financial Account Transaction DLO	Id	Financial Account Transaction	Id

DLO Name	DLO Attribute	DMO Name	DMO Attribute
Financial Account Transaction DLO	Issuing Bank Name	Financial Account Transaction	Issuing Bank Name
Financial Account Transaction DLO	Merchant Category Code	Financial Account Transaction	Merchant Category Code
Financial Account Transaction DLO	Merchant Name	Financial Account Transaction	Merchant Name
Financial Account Transaction DLO	Name	Financial Account Transaction	Name
Financial Account Transaction DLO	Running Balance Amount	Financial Account Transaction	Running Balance Amount
Financial Account Transaction DLO	Secret Key Identifier	Financial Account Transaction	Secret Key Identifier
Financial Account Transaction DLO	Source System Identifier	Financial Account Transaction	Source System Identifier
Financial Account Transaction DLO	Source Transaction Identifier	Financial Account Transaction	Source Transaction Identifier
Financial Account Transaction DLO	Source Transaction Type Code	Financial Account Transaction	Source Transaction Type Code
Financial Account Transaction DLO	Target Account Identifier	Financial Account Transaction	Target Account Identifier
Financial Account Transaction DLO	Transaction Amount	Financial Account Transaction	Transaction Amount
Financial Account Transaction DLO	Transaction Date	Financial Account Transaction	Transaction Date
Financial Account Transaction DLO	Transaction Location Name	Financial Account Transaction	Transaction Location Name
Financial Account Transaction DLO	Transaction Posted Date	Financial Account Transaction	Transaction Posted Date
Financial Transaction Category	Financial Transaction Category	Financial Account Transaction	Financial Transaction Category

Set Up the Financial Services Cloud Data Kit

Set up and configure the components of the data kit.

Edit Data Lake Objects

Edit data lake objects (DLOs) that store transformed data and then map them to data model objects (DMOs). A data lake object is a container for the data brought into Data Cloud.

Create Data Transforms for the Data Lake Objects

A streaming data transform reads one record in a source data lake object, reshapes the record data, and writes one or more records to a target data lake object. The source and target objects must be different objects. A streaming data transform runs continuously as a streaming process, picking up new or changed data.

Activate the Financial Services Cloud Calculated Insights

Create a calculated insight from an installed Salesforce package in Data Cloud.

Edit Data Lake Objects

Edit data lake objects (DLOs) that store transformed data and then map them to data model objects (DMOs). A data lake object is a container for the data brought into Data Cloud.

1. In Data Cloud, click the **Data Lake Objects** tab.

2. Click **New**, click **Choose From Data Kits**, and click **Next**.

3. Select a data space.

4. In the Name column, select a data lake object and click **Next**.

5. In the Data Lake Object Name and API Name fields, remove the word `copy`. The name and API name must match the table.

6. In Category, select **Profile**.

7. Click **Save**.

8. Repeat these steps for the remaining data lake objects.

Data Lake Object Name	Data Lake Object API Name	Category
Financial Account Balance DLO	Financial_Account_Balance_DLO	Profile
Financial Account Limit DLO	Financial_Account_Limit_DLO	Profile
Party Financial Asset DLO	Party_Financial_Asset_DLO	Profile
Party Financial Liability DLO	Party_Financial_Liability_DLO	Profile
Contact B2B DLO	Contact_B2B_DLO	Profile
Account B2B DLO	Account_B2B_DLO	Profile
Account B2C DLO	Account_B2C_DLO	Profile

Create Data Transforms for the Data Lake Objects

A streaming data transform reads one record in a source data lake object, reshapes the record data, and writes one or more records to a target data lake object. The source and target objects must be different objects. A streaming data transform runs continuously as a streaming process, picking up new or changed data.

Use a streaming data transform to clean ingested data. Then, map the improved data to the data model. Transformed data is stored in data lake objects (DLOs) and then mapped to data model objects (DMOs).

1. In Data Cloud, click the **Data Transforms** tab.

2. Click **New**.

3. Select **Create from Data Kit** and click **Next**.

4. Select a Data Transform and click **Next**.

5. Enter the Data Transform Label and Data Transform API Name.

6. Select the Target Data Lake Object.

7. Enter the description.

8. Click **Next**.

9. In the Expression, replace `<table>` with the Data Stream Name.

10. Verify your SQL statement's syntax by clicking **Check Syntax**.

    If a streaming data transform contains syntax errors or validation errors, such as incorrect API names for the source DLO and target DLOs, you can't save it. These errors appear on the left side. Fix them before saving.

11. Save the transformation. Streaming data transforms are activated immediately when saved.

    You can't change a streaming data transform after saving it. If you must change a streaming data transform, delete it and create another one.

12. Complete these steps to create the data transforms in the table.

(!) **Important:** The record type ID for Assets and Liabilities is unique to your Salesforce org. In 2 of the data transforms, you must update the record type ID to match the record type ID in your Salesforce org.

- On the Party Financial Asset Data Transform SQL Query, update the Record Type ID: 012RN000000HEwSYAW to the Record Type Id for Assets from your Salesforce org.

- On the Party Financial Liability Data Transform SQL Query, update the Record Type ID: 012RN000000HEwSYAW to the Record Type Id for Liability from your Salesforce org.

Data Transform Label	Data Transform API Name	Description	Target DLO	Data Stream Name
Financial Account Balance Data Transform Part1	Financial_Account_Balance_Data_Transform_Part1	Transform balance fields into Financial Account Balance DLO	Financial Account Balance DLO	Financial_Account_Data_Stream__dl
Financial Account Balance Data Transform Part2	Financial_Account_Balance_Data_Transform_Part2	Transform balance fields into Financial Account Balance DLO	Financial Account Balance DLO	Financial_Account_Data_Stream__dl

Data Transform Label	Data Transform API Name	Description	Target DLO	Data Stream Name
Financial Account Limit Data Transform	Financial_Account_Limit_Data_Transform	Transform Financial Account limit fields into Financial Account Limit DLO	Financial Account Limit DLO	Financial_Account_Data_Stream__dl
Party Financial Asset Data Transform	Party_Financial_Asset_Data_Transform	Transform to segregate Asset from Assets and Liabilities	Party Financial Asset DLO	Assets_and_Liabilies_Data_Stream__dl
Party Financial Liability Data Transform	Party_Financial_Liability_Data_Transform	Transform to segregate Liability from Assets and Liabilities	Party Financial Liability DLO	Assets_and_Liabilies_Data_Stream__dl
Account B2B Data Transform	Account_B2B_Data_Transform	Transform to segregate B2B Accounts from the rest	Account B2B DLO	Account_Data_Stream__dll
Account B2C Data Transform	Account_B2C_Data_Transform	Transform to segregate B2C Accounts from the rest	Account B2C DLO	Account_Data_Stream__dll
Contact B2B Data Transform	Contact_B2B_Data_Transform	Transform to segregate B2B Contacts from the rest	Contact B2B DLO	Contact_Data_Stream__dll

SEE ALSO:

Streaming Data Transforms

Activate the Financial Services Cloud Calculated Insights

Create a calculated insight from an installed Salesforce package in Data Cloud.

1. In Data Cloud, click the **Calculated Insights** tab.

2. Click **Next**.

3. Click **Create from a Data Kit**, then click **Next**.

4. Select the **Credit Card Use Ratio** calculated insight.

5. Click **Next**.

6. Click **Check Syntax**.

7. Click **Activate**.

8. In Schedule, select a time frame to publish the calculated insight.

9. Click **Enable**.

10. Complete the steps for these calculated insights:

- Total Outstanding Credit

- Percentage of Assets to Liabilities

- Managed Financial Account Balance

- Held Away Financial Account Balance

- Financial Account Balance Wallet Share

- Financial Account Balance Net Worth

- Average Monthly Expenditure Cover

- Total Monthly Expenses

- Monthly Expenses by Category

- Expenses for 3 Months

- Expenses for 6 Months

- Expenses for 1 Year

- Large Expense

- Percentage of Cash Inflow Spent

- Total Monthly Deposits

- Monthly Deposits by Category

- Deposits for 3 Months

- Deposits for 6 Months

- Deposits for 1 Year

- Large Deposit

- Total Number of Accounts

- Total Annual Expenses

- Total Expenses by Month Last 12 Months

- Total Deposits by Month Last 12 Months

SEE ALSO:

Create a Calculated Insight from a Package

Calculated Insights

Calculate Customer Insights Using Data Cloud

You can use a calculated insight to define and calculate multidimensional metrics on your entire digital state in Data Cloud. You can create metrics at the profile, segment, and population levels.

Use Financial Services Cloud calculated insights to learn more about your clients and identify trends.

Name	Description
Deposits for 3 Months	Total / average deposits for the past 3 months , starting from the last day of the previous month.
Deposits for 6 Months	Total / average deposits for the past 6 months, starting from the last day of the previous month.
Deposits for 1 year	Total / average deposits for the past 1 year, starting from the last day of the previous month.
Expenses for 3 Months	Total / average expenses for the past 3 months, starting from the last day of the previous month.
Expenses for 6 Months	Total / average expenses for the past 6 months, starting from the last day of the previous month.
Expenses for 1 Year	Total / average expenses for the past 1 year, starting from the last day of the previous month.
Average Monthly Expenditure Cover	Number of months that expenses can be paid from available balances.
Credit Card Use Ratio	Ratio of credit used to credit available across all cards.
Financial Account Balance Net Worth	Sum of financial account balances including both managed and held away, less the total outstanding credit.
Financial Account Balance Wallet Share	Ratio of Managed Financial Account Balance to Held Away Financial Account Balance.
Held Away Financial Account Balance	Sum of all Financial Account balances of type General, Investment, Savings, and Checking that are held away.
Large Deposit	Deposit that is 2 standard deviation larger than an average deposit.
Large Expense	Expense that is 2 standard deviation larger than an average expense.
Managed Financial Account Balance	Sum of all Financial Account balances of type General, Investment, Savings, and Checking under management.

Name	Description
Monthly Expenses by Category	Sum of all debit transactions broken down by category for the calendar month.
Monthly Inflow Transactions	The sum of all monthly inflow transactions.
Monthly Deposits by Category	The sum of all monthly inflow transactions sorted by merchant category code.
Percentage of Assets to Liabilities	Total assets divided by total liabilities.
Percentage of Cash Inflow Spent	The total monthly cash inflow divided by the total cash outflow.
Total Annual Expenses	The sum of all outgoing transactions year to date.
Total Monthly Deposits	The sum of all monthly deposits.
Total Monthly Expenses	The sum of all monthly outgoing transactions.
Total Number of Accounts	Number of financial accounts held by the customer.
Total Outstanding Credit	Total of all credit and lending product balances.
Total Expenses by Month Last 12 Months	The total of each financial account's outgoing transactions by month for the last 12 months.
Total Deposits by Month Last 12 Months	The total of all financial accounts inflow transactions by month for the last 12 months.

View Calculated Insight Data in Data Cloud

In Data Explorer, view the data from your data lake objects (DLOs), data models objects (DMOs), and calculated insight objects (CIOs). Customize your view by editing the columns and use filters to show only the most relevant data for the selected object.

SEE ALSO:

Data Explorer

View Calculated Insight Data in Data Cloud

In Data Explorer, view the data from your data lake objects (DLOs), data models objects (DMOs), and calculated insight objects (CIOs). Customize your view by editing the columns and use filters to show only the most relevant data for the selected object.

1. In Data Cloud, click the **Data Explorer** tab.

2. In Data Space, select **Default**.

3. In Object, select **Calculated Insights**.

4. To view data, select a calculated insight.

View Visualized Insights in Salesforce

View calculated insights data in Salesforce using FlexCards. View client transaction data in pre-configured FlexCards that contain clickable actions that change according to the context in which they appear and based on the information that they contain. To display data on the FlexCards, Salesforce and Data Cloud must be on the same org.

Assign Permissions to View FlexCards
Give users access to OmniStudio so that they can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures when viewing and interacting with FlexCards.

Customize Lightning Pages to View Client Transactions
Stay on top of your client's transaction trends by adding the FSCDataCloudCashFlowByCategory and FSCDataCloudShowIncomeExpenses FlexCards to the person account record page.

View Client Income and Expenses
The FSCDataCloudShowIncomeExpenses FlexCard shows a client's cash flow trends over a selected time frame. The FlexCard focuses on incoming and outgoing transactions to highlight periods of cash flow surplus and deficit. Select a time frame to show an aggregated cash flow across all of the client's financial accounts over the last 3, 6, or 12 months. Review metrics that show your client's total income, total expenses, total surplus, average monthly income, average monthly expenses, and average monthly surplus. A bar graph shows a month by month breakdown of your client's total income and expenses.

View Client Cash Flow by Category

The FSCDataCloudCashFlowByCategory FlexCard shows the client's income and expenses for the last month grouped by category. The FlexCard categorizes and shows a client's sources of income and expenses to identify where your client's money is coming from and going to. The time frame is the previous calendar month and shows an aggregated view of all financial accounts for the client. A pie chart and list show a breakdown of your client's top five outgoing or incoming transaction categories for the previous calendar month, with the remaining categories grouped as Other.

SEE ALSO:

FlexCards

Assign Permissions to View FlexCards

Give users access to OmniStudio so that they can create and run OmniScripts, DataRaptors, FlexCards, and Integration Procedures when viewing and interacting with FlexCards.

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

2. Confirm that the OmniStudio Admin or OmniStudio User, and Data Cloud for Financial Services Cloud User or Data Cloud for Financial Services Cloud Admin User permission set is assigned to the users.

3. If a permission set isn't assigned to the users, follow these steps:

   a. In the Permission Set Assignments related list, click **Edit Assignments**.

   b. Add the OmniStudio Admin or OmniStudio User permission set to Enabled Permission Sets.

   c. Add the Data Cloud for Financial Services Cloud User or Data Cloud for Financial Services Cloud Admin User permission set to Enabled Permission Sets.

   d. Save your changes.

SEE ALSO:

OmniStudio

Customize Lightning Pages to View Client Transactions

Stay on top of your client's transaction trends by adding the FSCDataCloudCashFlowByCategory and FSCDataCloudShowIncomeExpenses FlexCards to the person account record page.

1. To add the FSCDataCloudCashFlowByCategory FlexCard to the person account record page, follow these steps:

   a. On the person account record page, go to Lightning App Builder.

   b. Drag the FlexCard component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

   c. In the Properties pane, select the **FSCDataCloudCashFlowByCategory** FlexCard component in the FlexCard Name field.

   d. Save your changes.

   e. If your page is new, activate the page.

2. To add the FSCDataCloudShowIncomeExpenses FlexCard to the person account record page, follow these steps:

   a. On the person account record page, go to Lightning App Builder.

   b. Drag the FlexCard component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

   c. In the Properties pane, select the **FSCDataCloudShowIncomeExpenses** FlexCard component in the FlexCard Name field.

   d. Save your changes.

   e. If your page is new, activate the page.

SEE ALSO:

Create and Configure Lightning Experience Record Pages

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

To use Data Cloud for Financial Services Cloud:

- Salesforce org: Financial Services Cloud Extension

  AND

  Data Cloud for Financial Services Cloud Admin User

  OR

  Data Cloud for Financial Services Cloud User

  AND

  Data Cloud org: Data Cloud Admin

View Client Income and Expenses

The FSCDataCloudShowIncomeExpenses FlexCard shows a client's cash flow trends over a selected time frame. The FlexCard focuses on incoming and outgoing transactions to highlight periods of cash flow surplus and deficit. Select a time frame to show an aggregated cash flow across all of the client's financial accounts over the last 3, 6, or 12 months. Review metrics that show your client's total income, total expenses, total surplus, average monthly income, average monthly expenses, and average monthly surplus. A bar graph shows a month by month breakdown of your client's total income and expenses.

1. Click a Person Account record.

2. On the Cash Flow Summary FlexCard, view these details:
   - Total income: Total deposits for the selected time frame.
   - Total expenses: Total expenses for the selected time frame.
   - Total surplus: A calculation of total income less total expenses for the selected time frame.
   - Average monthly income: The average monthly deposits for the selected time frame.
   - Average monthly expenses: The average monthly expenses for the selected time frame.
   - Average monthly surplus: A calculation of average monthly income less average monthly expenses for the selected time frame.

3. To update the FlexCard data, select a Time Frame of Last 3 Months, Last 6 Months, or Last 12 Months.

4. The bar graph shows monthly income and expenses to you can identify your client's months of cash flow surplus and deficit.

View Client Cash Flow by Category

The FSCDataCloudCashFlowByCategory FlexCard shows the client's income and expenses for the last month grouped by category. The FlexCard categorizes and shows a client's sources of income and expenses to identify where your client's money is coming from and going to. The time frame is the previous calendar month and shows an aggregated view of all financial accounts for the client. A pie chart and list show a breakdown of your client's top five outgoing or incoming transaction categories for the previous calendar month, with the remaining categories grouped as Other.

1. Click a person account record.

2. On the Cash Flow by Category FlexCard, view these details:

   - A pie chart of your client's top five outgoing or incoming transaction categories for the previous calendar month.

   - A list of your client's top five outgoing or incoming transaction categories for the previous calendar month.

   - Total income or expenses for the previous calendar month.

3. To view your client's expenses for the previous calendar month, select **Income**.

4. To view your client's income for the previous calendar month, select **Expenses**.

Data Cloud for Financial Services Cloud FlexCards and Related Components

The Data Cloud for Financial Services Cloud OmniStudio components display calculated insights data in Salesforce. They let users view client transaction data in pre-configured FlexCards. These components consist of FlexCards and Integration Procedures.

For detailed steps on how to version, clone, edit, and activate OmniStudio components, see the OmniStudio documentation.

Client Income and Expenses FlexCards

Data Cloud for Financial Services Cloud FlexCard.

Client Cash Flow by Category FlexCards

Data Cloud for Financial Services Cloud FlexCard.

Integration Procedures for Data Cloud for Financial Services Cloud FlexCards

The Data Cloud for Financial Services Cloud FlexCards depend on the following Integration Procedures.

DataRaptors for Data Cloud for Financial Services Cloud FlexCards

The Data Cloud for Financial Services Cloud FlexCards FlexCards depend on the following DataRaptors.

Client Income and Expenses FlexCards

Data Cloud for Financial Services Cloud FlexCard.

FSCDataCloudShowIncomeExpenses FlexCard

Display monthly income and expenses for the selected time frame and a summary of the income and expenses for the selected time frame. This is the top-level FlexCard, which can be added to a Person Account record page.

Data Source: FSCDataCloud_RetrieveIncomeExpenseData Integration Procedure

Child FlexCard: FSCDataCloudIncomeExpenseGraph

Calls: FSCDataCloud_RetrieveIncomeExpenseData Integration Procedure

FSCDataCloudIncomeExpenseGraph FlexCard

Display monthly income and expenses in a bar graph for the selected time frame.

Data Source: Same as parent.

Parent FlexCard: FSCDataCloudShowIncomeExpenses

Client Cash Flow by Category FlexCards

Data Cloud for Financial Services Cloud FlexCard.

FSCDataCloudCashFlowByCategory FlexCard

Shows the client's income and expenses for the last month grouped by category. This is the top-level FlexCard, which can be added to a Person Account record page.

Data Source: FSCDataCloud_RetrieveCashFlowByCategoryData Integration Procedure

Child FlexCard: FSCDataCloudCashFlowByCategoryPicChart

Calls: FSCDataCloud_RetrieveCashFlowByCategoryData Integration Procedure

FSCDataCloudCashFlowByCategoryPieChart FlexCard

Shows the client's income and expenses for the last month grouped by category. This is the top-level FlexCard, which can be added to a Person Account record page.

Data Source: Same as parent.

Parent FlexCard: FSCDataCloudCashFlowByCategoryPieChart

Integration Procedures for Data Cloud for Financial Services Cloud FlexCards

The Data Cloud for Financial Services Cloud FlexCards depend on the following Integration Procedures.

FSCDataCloud_RetrieveIncomeExpenseData Integration Procedure

Retrieve calculated insight data to show on the FSCDataCloudShowIncomeExpenses FlexCard.

Called By: FSCDataCloudShowIncomeExpenses FlexCard

Calls:

- industriespersonalizedfinance.CDPQuery Apex class, hasRecordAccess method
- industriespersonalizedfinance.CDPQuery Apex class, hasPersonAccount method
- industriespersonalizedfinance.CDPQuery Apex class, getCalculatedInsight
- FSCDataCloudTransformIncomeExpenseData DataRaptor Transform

FSCDataCloud_RetrieveCashFlowByCategoryData Integration Procedure

Retrieve calculated insight data to show on the FSCDataCloudCashFlowByCategory FlexCard.

Called By: FSCDataCloudCashFlowByCategory FlexCard

Calls:

- industriespersonalizedfinance.CDPQuery Apex class, hasRecordAccess method
- industriespersonalizedfinance.FSCPersonalizedFinanceUtil Apex Class, getIncomeExpenseCategories method
- getCalculatedInsight.CDPQuery Apex Class, hasPersonAccount method

DataRaptors for Data Cloud for Financial Services Cloud FlexCards

The Data Cloud for Financial Services Cloud FlexCards FlexCards depend on the following DataRaptors.

FSCDataCloudTransformIncomeExpenseData DataRaptor Transform

Transform the calculated insight data to show on the FSCDataCloudShowIncomeExpenses FlexCard.

Called By: FSCDataCloud_RetrieveIncomeExpenseData Integration Procedure

Revenue Intelligence for Financial Services

Get predictions about Retail Management and Wealth Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Identify Wealth Management customers are likely to add more assets in a specific period, pursue such customers by pitching products for sale to increase your assets under management. Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.

Churn Prediction for Retail Banking Customers

Get predictions about Retail Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Churn predictions are based on data from customers' accounts. You can also include Feedback Management and Sentiment Insights features from contacts associated with your customers' accounts.

Churn Prediction for Wealth Management Customers

Get predictions about Wealth Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Churn predictions are based on data from customers' accounts. You can also include Feedback Management and Sentiment Insights features from contacts associated with your customers' accounts.

Increase Your Assets Under Management from Wealth Management Customers

Identify wealth management customers are likely to add more assets in a specific period. Pursue such customers by pitching products for sale to increase your assets under management.

Maximize Your Revenue by Recommending the Right Products to Customers

Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.

Scoring Framework Predictions

Pitch the right products to customers and boost your revenue by analyzing customers' likelihood of purchasing financial assets. Decrease customer attrition by taking steps based on the customer's likelihood of churning. Sell an asset to an interested customer based on predictions and increase your customer's assets under management. Get prediction scores based on the data of your accounts and contacts.

Scoring Framework Predictions on Actionable Lists

Create an actionable list of the customers to prioritize and show the relevant predictions that Scoring Framework generates on the list so that you can focus on the right customers.

Churn Prediction for Retail Banking Customers

Get predictions about Retail Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Churn predictions are based on data from customers' accounts. You can also include Feedback Management and Sentiment Insights features from contacts associated with your customers' accounts.

🛑 **Important:** The Churn Risk machine learning model uses several variables to generate predictions, including potentially sensitive personal information such as age and marital status. You can remove or adjust the use of these variables. For more information, see Explain, Predict, and Take Action with Einstein Discovery.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

Data Requirements

The machine learning model requires features from some Salesforce objects and datasets.

Feedback Management and Sentiment Insight Features

To get customer churn predictions, you can optionally include Feedback Management and Sentiment Insights features for contacts associated with your customer's accounts.

Customer Churn Predictions

Get predictions about Retail Banking customers who are likely to churn by creating an app using the Customer Churn Risk for Retail Banking template.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

1. Enable CRM Analytics.

2. Assign admins the required permission sets to create and manage a Financial Services Cloud Analytics app.

3. Assign users the required permission sets to view a Financial Services Cloud Analytics app.

4. Assign Analytics Cloud Integration users the required permission sets.

SEE ALSO:

    Enable CRM Analytics in Financial Services Cloud

    Assign CRM Analytics for Financial Services Administrator Permissions

    Assign CRM Analytics for Financial Services User Permissions

    Grant Permission to the Analytics Integration User

Data Requirements

The machine learning model requires features from some Salesforce objects and datasets.

Before creating an app by using the Feedback Management & Sentiment Insights Features template, make sure that you sync these fields:

Object	Field
Account	Account ID
Account	Account Name
Account	Account Type
Account	Deleted
Account	Record Type ID
AI Sentiment Result	Deleted
AI Sentiment Result	Mixed Confidence Score
AI Sentiment Result	Name
AI Sentiment Result	Negative Confidence Score
AI Sentiment Result	Neutral Confidence Score
AI Sentiment Result	Overall Sentiment Score
AI Sentiment Result	Overall Sentiment Type
AI Sentiment Result	Owner ID
AI Sentiment Result	Positive Confidence Score
AI Sentiment Result	Sentiment Analysis Result ID

Object	Field
AI Sentiment Result	Source Object ID
AI Sentiment Result	Source Object Type
AI Sentiment Result	Source Text Field
AI Sentiment Result	Source Text Language
AI Sentiment Result	Status
Contact	Account ID
Contact	Contact ID
Contact	Deleted
Contact	First Name
Contact	Full Name
Contact	Last Name
Contact	Master Record ID
Contact	Record Type ID
Contact	Salutation
Record Type	Name
Record Type	Record Type ID
Record Type	Record Type Name
Record Type	SObject Type Name
Survey	Deleted
Survey	Name
Survey	Number of Versions
Survey	Owner ID
Survey	Survey ID
Survey	Survey Version ID
Survey Invitation	Deleted
Survey Invitation	Name
Survey Invitation	Participant ID
Survey Invitation	Response Status
Survey Invitation	Survey ID
Survey Invitation	Survey Invitation ID

Object	Field
Survey Question	Question Name
Survey Question	Question Type
Survey Question	Survey Question ID
Survey Question	Survey Version ID
Survey Question Response	Created Date
Survey Question Response	Name
Survey Question Response	Response Value
Survey Question Response	Survey Invitation ID
Survey Question Response	Survey Question ID
Survey Question Response	Survey Question Response ID
Survey Question Response	Survey Response ID

Before creating an app by using the Customer Churn Risk for Retail Banking template, make sure that you sync these fields.

Note: Syncing fields of the Task object is optional.

Object	Field
Account	Account ID
Account	Branch Code
Account	Branch Name
Account	Total Bank Deposits
Account	Total Bank Deposits Joint Owner
Account	Total Bank Deposits Primary Owner
Account	Total Outstanding Credit -Joint Owner
Account	Total Outstanding Credit - Primary Owner
Account	Total Outstanding Credit
Branch Unit	Branch Unit ID
Branch Unit	Name
Branch Unit Customer	Account ID
Branch Unit Customer	Branch Unit ID
Branch Unit Customer	Branch Unit Customer ID
Case	Account ID

Object	Field
Case	Case ID
Case	Closed Date
Case	Created Date
Case	Escalated
FinServ__ChargesAndFees__c	Annual Account Charge
FinServ__ChargesAndFees__c	Annual Membership Fee
FinServ__ChargesAndFees__c	ATM Fee
FinServ__ChargesAndFees__c	Cash Advance Fee
FinServ__ChargesAndFees__c	Charges and fees ID
FinServ__ChargesAndFees__c	Charges And Fees Name
FinServ__ChargesAndFees__c	Foreign Transaction Fee
FinServ__ChargesAndFees__c	Insufficient Funds Fee
FinServ__ChargesAndFees__c	Late Payment Fee
FinServ__ChargesAndFees__c	Monthly Service Fee
FinServ__ChargesAndFees__c	Overdraft Fees
FinServ__ChargesAndFees__c	Owner ID
FinServ__ChargesAndFees__c	Record Type ID
FinServ__ChargesAndFees__c	Statement Fee
Task	Account ID
Task	Activity Date
Task	Closed
Task	Created Date
Task	Due Date Only
Task	High Priority

The app created by using the Customer Churn Risk for Retail Banking uses these columns from the CRM Analytics datasets.

Dataset	Field
Account Snapshot	Account ID
Account Snapshot	Account Name
Account Snapshot	Account Rating

Dataset	Field
Account Snapshot	AUM
Account Snapshot	Billing Zip/Postal Code
Account Snapshot	Category
Account Snapshot	Days Since Last Interaction
Account Snapshot	FinServ__PrimaryContact__c.FinServ__Age__c
Account Snapshot	FinServ__PrimaryContact__c.FinServ__Gender__c
Account Snapshot	Investment Experience
Account Snapshot	Investment Objectives
Account Snapshot	Last Interaction
Account Snapshot	Last Review
Account Snapshot	Marketing Segment
Account Snapshot	Record Type Name
Account Snapshot	Relationship Length
Account Snapshot	Review Frequency
Account Snapshot	Risk Tolerance
Account Snapshot	Snapshot Date
Account Snapshot	Snapshot Text Date
Account Snapshot	Status
Account Snapshot	Time Horizon
Account Snapshot	Wallet Share
Financial Account Snapshot	Account ID
Financial Account Snapshot	Asset Rebalance
Financial Account Snapshot	Available Credit
Financial Account Snapshot	Average Balance
Financial Account Snapshot	Balance
Financial Account Snapshot	Cash Balance
Financial Account Snapshot	Cash Limit
Financial Account Snapshot	Charges and Fees
Financial Account Snapshot	Daily Withdrawal Limit
Financial Account Snapshot	Incoming Volume

Dataset	Field
Financial Account Snapshot	Insured Amount
Financial Account Snapshot	Interest Rate
Financial Account Snapshot	Minimum Balance
Financial Account Snapshot	Minimum Payment
Financial Account Snapshot	Number of Holdings
Financial Account Snapshot	Outgoing Volume
Financial Account Snapshot	Pending Deposits
Financial Account Snapshot	Performance 1Yr
Financial Account Snapshot	Performance 3Yr
Financial Account Snapshot	Performance MTD
Financial Account Snapshot	Performance QTD
Financial Account Snapshot	Performance YTD
Financial Account Snapshot	Premium
Financial Account Snapshot	Principal Balance
Financial Account Snapshot	Rebalance Frequency
Financial Account Snapshot	Record Type
Financial Account Snapshot	Snapshot Date
Financial Account Snapshot	Snapshot Text Date
Financial Account Snapshot	Status
Financial Account Snapshot	Total Credit Limit
Feedback Management & Sentiment Insights Prediction Set	Average Mixed Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Negative Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Neutral Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Overall Sentiment Score
Feedback Management & Sentiment Insights Prediction Set	Average Positive Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Final Account ID
Feedback Management & Sentiment Insights Prediction Set	NPS Score
Feedback Management & Sentiment Insights Prediction Set	Sum of CSAT

SEE ALSO:

Add and Remove Local Salesforce Objects and Fields from Data Sync

Feedback Management and Sentiment Insight Features

To get customer churn predictions, you can optionally include Feedback Management and Sentiment Insights features for contacts associated with your customer's accounts.

[Create an App to Generate Feedback Management and Sentiment Insight Features](#)
Use the Feedback Management & Sentiment Insights Features template to create an app that runs recipes to generate example and prediction sets. The example and prediction sets are created based on your customers' account and contact data, their responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses.

[Feedback Management and Sentiment Insights Recipes and Datasets](#)
The app created by using the Feedback Management & Sentiment Insights Features template runs two recipes to generate example and prediction sets.

Create an App to Generate Feedback Management and Sentiment Insight Features

Use the Feedback Management & Sentiment Insights Features template to create an app that runs recipes to generate example and prediction sets. The example and prediction sets are created based on your customers' account and contact data, their responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Feedback Management & Sentiment Insights Features** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

   Analytics runs a compatibility check of the data in Salesforce.

5. Review the compatibility check results.

   If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

   If the compatibility check completes successfully, click **Looks good, next**.

6. Select the number of days for which you want to predict the likelihood of customer churn.

7. Enter a name for your app, and then click **Create**.

   The process takes a few minutes.

8. To view your app after the process is completed, refresh the page.

9. To view the generated dataset, open the app, and click **Datasets**.

The app runs preconfigured recipes to generate example and prediction sets containing Feedback Management and Sentiment Insights features.

> **EDITIONS**
>
> Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license
>
> Feedback Management features are available with the Feedback Management - Starter license or the Feedback Management - Growth license.
>
> Sentiment Insights features are available with the Feedback Management - Starter license or the Feedback Management - Growth license, and the Sentiment Insights license.

Feedback Management and Sentiment Insights Recipes and Datasets

The app created by using the Feedback Management & Sentiment Insights Features template runs two recipes to generate example and prediction sets.

Table 23: Recipes and Datasets

Recipe	Description	Generated Dataset
Example Dataset	The recipe evaluates your customers' account and contact data, their survey responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses to create an example set (training set) that Einstein learns from.	Example Dataset
Prediction Dataset	The recipe evaluates your customers' account and contact data, their survey responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses to create a prediction set (scoring set) for which Einstein gets predictions.	Prediction Dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

Customer Churn Predictions

Get predictions about Retail Banking customers who are likely to churn by creating an app using the Customer Churn Risk for Retail Banking template.

By using the Customer Churn Risk for Retail Banking template, you can create an app that provides prediction scores about the likelihood of Retail Banking customers churning.

The app created by using the Customer Churn Risk for Retail Banking template creates three customizable recipes, four datasets, and two dashboards.

Create an App to Identify Retail Banking Customers Likely to Churn

By using the Customer Churn Risk for Retail Banking template, you can create an app that provides prediction scores about the likelihood of Retail Banking customers churning.

Before you use the Customer Churn Risk for Retail Banking template, get the required snapshot datasets by creating an app using the Analytics for Retail Banking template. If you want to use Feedback Management & Sentiment Insights features for predicting customer churn, get the required datasets by creating an app using the Feedback Management & Sentiment Insights Features template.

> ⛔ **Important:** You can create an app by using the Customer Churn Risk for Retail Banking template only when snapshot data is available for at least 30 days.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Customer Churn Risk for Retail Banking** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

    Analytics runs a compatibility check of the data in Salesforce.

5. Review the compatibility check results.

    - If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

    - If the compatibility check completes successfully, click **Looks good, next**.

6. Configure these settings in the next screen:

    a. Select an account app with a snapshot dataset containing past trends.

    b. Select the account app's snapshot dataset for the model to use to determine patterns.

    c. Select a financial account app with a snapshot dataset containing past trends.

    d. Select the financial account app's snapshot dataset for the model to use to determine patterns.

    e. Click **Looks good, next**.

    > 📝 **Note:** Select snapshot datasets generated by the app that's created by using the Analytics for Retail Banking template.

7. Configure these settings in the next screen.

    a. Select the number of days for which you want to predict the likelihood of customer churn.

    b. Select the record types of accounts for which you want to predict the likelihood of churn.

    c. Select the record types of financial accounts related to the accounts for which you want to predict the likelihood of churn.

    d. Click **Looks Good, Next**.

8. Configure these settings in the next screen.

   a. Select account statuses that indicate that the account is inactive.

   b. Select account statuses that indicate that the account is active.

   c. Click **Looks Good, Next**.

9. Specify if you want to include example and prediction sets with Feedback Management and Sentiment Insights features and click **Looks Good, Next**.

10. If you chose to include Feedback Management and Sentiment Insights features, configure these settings in the next screen. Otherwise, move to the next step.

    a. Select the example set generated by the app that's created by using the Feedback Management & Sentiment Insights Features template.

    b. Select the prediction set generated by the app that's created by using the Feedback Management & Sentiment Insights Features template.

11. Enter a name for your app, and then click **Create**.

    The process takes a few minutes.

12. To view your app after the process is completed, refresh the page.

The app now runs preconfigured recipes to generate example, historical, feature, and prediction datasets, and two dashboards.

Recipes, Datasets, and Dashboards

The app created by using the Customer Churn Risk for Retail Banking template creates three customizable recipes, four datasets, and two dashboards.

Recipes and Datasets
The app created by using the Customer Churn Risk for Retail Banking template creates three recipes. The recipes create example, historical, prediction, and predicted score datasets.

Churn Prediction for Retail Banking Customers Dashboard
Show interactive visualizations of predicted churn of Retail Banking customers by adding dashboards to Financial Service Cloud pages.

Recipes and Datasets

The app created by using the Customer Churn Risk for Retail Banking template creates three recipes. The recipes create example, historical, prediction, and predicted score datasets.

Table 24: Recipes and Datasets

Recipe	Description	Output
Retail Banking Churn Example Dataset	The recipe evaluates account snapshot data, financial account snapshot data, and data from configured objects to create an example dataset that Einstein learns from. If you chose to include Feedback Management and Sentiment Insights features when creating the app, the recipe also evaluates the example set containing these features.	Example dataset
Retail Banking Churn Feature Dataset	The recipe evaluates account snapshot data, financial account snapshot data, and data from configured objects to create a historical dataset with details of accounts that were previously likely to churn. The recipe also creates a prediction dataset based on which Retail Banking customers who are likely to churn are identified. If you chose to include Feedback Management and Sentiment Insights features when creating the app, the recipe also evaluates the prediction set containing these features.	• Historical dataset • Prediction dataset
Retail Banking Churn Prediction Dataset	Evaluates the prediction dataset to get the churn score of customers and the top three factors that possibly contribute to churn.	Predicted Score and Top Contributing Factor dataset

You can modify the recipes in these scenarios:

• Your schema deviates from the Financial Services Cloud schema.

• A custom field of an existing entity changes.

• The use of feature data changes from an existing entity to a custom entity.

• The data doesn't load properly.

- The app stops working because of incorrect data values.

SEE ALSO:

    Manage Recipes

    Run Data Sync and Recipes to Create and Refresh Datasets

    Einstein Discovery Capacities and Requirements

Churn Prediction for Retail Banking Customers Dashboard

Show interactive visualizations of predicted churn of Retail Banking customers by adding dashboards to Financial Service Cloud pages.

Churn Prediction for Retail Banking Customers Dashboard

Add this dashboard to the Home page to see predicted churn details for Retail Banking customers. You can filter the prediction data for each branch unit, account, account record type, marketing segment, and account category.

Churn Prediction for Retail Banking Customers (Embedded) Dashboard

Add this dashboard to any record page to see predicted churn details for a Retail Banking customer. You can filter the prediction data based on the account balance, outstanding credit, and churn score groups.

SEE ALSO:

    Embed Dashboards in Lightning Pages

    Use the Retail Banking Customer Churn Prediction Dashboards

Churn Prediction for Wealth Management Customers

Get predictions about Wealth Management customers who are likely to churn and reduce their likelihood to churn by analyzing their churn scores. Churn predictions are based on data from customers' accounts. You can also include Feedback Management and Sentiment Insights features from contacts associated with your customers' accounts.

🛑 **Important:** The Churn Risk machine learning model uses several variables to generate predictions, including potentially sensitive personal information such as age and marital status. You can remove or adjust the use of these variables. For more information, see Explain, Predict, and Take Action with Einstein Discovery.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

Data Requirements

The machine learning model requires features from some Salesforce objects and datasets.

Feedback Management and Sentiment Insight Features

To get customer churn predictions, you can optionally include Feedback Management and Sentiment Insights features for contacts associated with your customer's accounts.

[Customer Churn Predictions](#)

Get predictions about Wealth Management customers who are likely to churn by creating an app using the Customer Churn Risk for Wealth Management template.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

1. Enable CRM Analytics.

2. Assign admins the required permission sets to create and manage a Financial Services Cloud Analytics app.

3. Assign users the required permission sets to view a Financial Services Cloud Analytics app.

4. Assign Analytics Cloud Integration users the required permission sets.

SEE ALSO:

[Enable CRM Analytics in Financial Services Cloud](#)

[Assign CRM Analytics for Financial Services Administrator Permissions](#)

[Assign CRM Analytics for Financial Services User Permissions](#)

[Grant Permission to the Analytics Integration User](#)

Data Requirements

The machine learning model requires features from some Salesforce objects and datasets.

Before creating an app by using the Feedback Management & Sentiment Insights Features template, make sure that you sync these fields:

Object	Field
Account	Account ID
Account	Account Name
Account	Account Type
Account	Deleted
Account	Record Type ID
AI Sentiment Result	Deleted
AI Sentiment Result	Mixed Confidence Score
AI Sentiment Result	Name
AI Sentiment Result	Negative Confidence Score
AI Sentiment Result	Neutral Confidence Score
AI Sentiment Result	Overall Sentiment Score
AI Sentiment Result	Overall Sentiment Type

Object	Field
AI Sentiment Result	Owner ID
AI Sentiment Result	Positive Confidence Score
AI Sentiment Result	Sentiment Analysis Result ID
AI Sentiment Result	Source Object ID
AI Sentiment Result	Source Object Type
AI Sentiment Result	Source Text Field
AI Sentiment Result	Source Text Language
AI Sentiment Result	Status
Contact	Account ID
Contact	Contact ID
Contact	Deleted
Contact	First Name
Contact	Full Name
Contact	Last Name
Contact	Master Record ID
Contact	Record Type ID
Contact	Salutation
Record Type	Name
Record Type	Record Type ID
Record Type	Record Type Name
Record Type	SObject Type Name
Survey	Deleted
Survey	Name
Survey	Number of Versions
Survey	Owner ID
Survey	Survey ID
Survey	Survey Version ID
Survey Invitation	Deleted
Survey Invitation	Name
Survey Invitation	Participant ID

Object	Field
Survey Invitation	Response Status
Survey Invitation	Survey ID
Survey Invitation	Survey Invitation ID
Survey Question	Question Name
Survey Question	Question Type
Survey Question	Survey Question ID
Survey Question	Survey Version ID
Survey Question Response	Created Date
Survey Question Response	Name
Survey Question Response	Response Value
Survey Question Response	Survey Invitation ID
Survey Question Response	Survey Question ID
Survey Question Response	Survey Question Response ID
Survey Question Response	Survey Response ID

Before creating an app by using the Customer Churn Risk for Wealth Management template, make sure that you sync these fields.

Object	Field
Account	Account ID
Account	Branch Code
Account	Branch Name
Account	Total Bank Deposits
Account	Total Bank Deposits Joint Owner
Account	Total Bank Deposits Primary Owner
Account	Total Outstanding Credit -Joint Owner
Account	Total Outstanding Credit - Primary Owner
Account	Total Outstanding Credit
Branch Unit	Branch Unit ID
Branch Unit	Name
Branch Unit Customer	Account ID
Branch Unit Customer	Branch Unit ID

Object	Field
Branch Unit Customer	Branch Unit Customer ID
Case	Account ID
Case	Case ID
Case	Closed Date
Case	Created Date
Case	Escalated
FinServ__ChargesAndFees__c	Annual Account Charge
FinServ__ChargesAndFees__c	Annual Membership Fee
FinServ__ChargesAndFees__c	ATM Fee
FinServ__ChargesAndFees__c	Cash Advance Fee
FinServ__ChargesAndFees__c	Charges and fees ID
FinServ__ChargesAndFees__c	Charges And Fees Name
FinServ__ChargesAndFees__c	Foreign Transaction Fee
FinServ__ChargesAndFees__c	Insufficient Funds Fee
FinServ__ChargesAndFees__c	Late Payment Fee
FinServ__ChargesAndFees__c	Monthly Service Fee
FinServ__ChargesAndFees__c	Overdraft Fees
FinServ__ChargesAndFees__c	Owner ID
FinServ__ChargesAndFees__c	Record Type ID
FinServ__ChargesAndFees__c	Statement Fee
Task	Account ID
Task	Activity Date
Task	Closed
Task	Created Date
Task	Due Date Only
Task	High Priority

The app created by using the Customer Churn Risk for Wealth Management uses these columns from the CRM Analytics datasets.

Dataset	Field
Account Snapshot	Account ID

Dataset	Field
Account Snapshot	Account Name
Account Snapshot	Account Rating
Account Snapshot	AUM
Account Snapshot	Billing Zip/Postal Code
Account Snapshot	Category
Account Snapshot	Days Since Last Interaction
Account Snapshot	FinServ__PrimaryContact__c.FinServ__Age__c
Account Snapshot	FinServ__PrimaryContact__c.FinServ__Gender__c
Account Snapshot	Investment Experience
Account Snapshot	Investment Objectives
Account Snapshot	Last Interaction
Account Snapshot	Last Review
Account Snapshot	Marketing Segment
Account Snapshot	Record Type Name
Account Snapshot	Relationship Length
Account Snapshot	Review Frequency
Account Snapshot	Risk Tolerance
Account Snapshot	Snapshot Date
Account Snapshot	Snapshot Text Date
Account Snapshot	Status
Account Snapshot	Time Horizon
Account Snapshot	Wallet Share
Financial Account Snapshot	Account ID
Financial Account Snapshot	Asset Rebalance
Financial Account Snapshot	Available Credit
Financial Account Snapshot	Average Balance
Financial Account Snapshot	Balance
Financial Account Snapshot	Cash Balance
Financial Account Snapshot	Cash Limit
Financial Account Snapshot	Charges and Fees

Dataset	Field
Financial Account Snapshot	Daily Withdrawal Limit
Financial Account Snapshot	Incoming Volume
Financial Account Snapshot	Insured Amount
Financial Account Snapshot	Interest Rate
Financial Account Snapshot	Minimum Balance
Financial Account Snapshot	Minimum Payment
Financial Account Snapshot	Number of Holdings
Financial Account Snapshot	Outgoing Volume
Financial Account Snapshot	Pending Deposits
Financial Account Snapshot	Performance 1Yr
Financial Account Snapshot	Performance 3Yr
Financial Account Snapshot	Performance MTD
Financial Account Snapshot	Performance QTD
Financial Account Snapshot	Performance YTD
Financial Account Snapshot	Premium
Financial Account Snapshot	Principal Balance
Financial Account Snapshot	Rebalance Frequency
Financial Account Snapshot	Record Type
Financial Account Snapshot	Snapshot Date
Financial Account Snapshot	Snapshot Text Date
Financial Account Snapshot	Status
Financial Account Snapshot	Total Credit Limit
Feedback Management & Sentiment Insights Prediction Set	Average Mixed Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Negative Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Neutral Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Average Overall Sentiment Score
Feedback Management & Sentiment Insights Prediction Set	Average Positive Confidence Score
Feedback Management & Sentiment Insights Prediction Set	Final Account ID
Feedback Management & Sentiment Insights Prediction Set	NPS Score

Dataset	Field
Feedback Management & Sentiment Insights Prediction Set	Sum of CSAT

SEE ALSO:

  Add and Remove Local Salesforce Objects and Fields from Data Sync

Feedback Management and Sentiment Insight Features

To get customer churn predictions, you can optionally include Feedback Management and Sentiment Insights features for contacts associated with your customer's accounts.

  Create an App to Generate Feedback Management and Sentiment Insight Features
  Use the Feedback Management & Sentiment Insights Features template to create an app that runs recipes to generate example and prediction sets. The example and prediction sets are created based on your customers' account and contact data, their responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses.

  Feedback Management and Sentiment Insights Recipes and Datasets
  The app created by using the Feedback Management & Sentiment Insights Features template runs two recipes to generate example and prediction sets.

Create an App to Generate Feedback Management and Sentiment Insight Features

Use the Feedback Management & Sentiment Insights Features template to create an app that runs recipes to generate example and prediction sets. The example and prediction sets are created based on your customers' account and contact data, their responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Feedback Management & Sentiment Insights Features** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

    Analytics runs a compatibility check of the data in Salesforce.

5. Review the compatibility check results

    If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

    If the compatibility check completes successfully, click **Looks good, next**.

6. Select the number of days for which you want to predict the likelihood of customer churn.

7. Enter a name for your app, and then click **Create**.

    The process takes a few minutes.

8. To view your app after the process is completed, refresh the page.

9. To view the generated dataset, open the app, and click **Datasets**.

The app runs preconfigured recipes to generate example and prediction sets containing Feedback Management and Sentiment Insights features.

Feedback Management and Sentiment Insights Recipes and Datasets

The app created by using the Feedback Management & Sentiment Insights Features template runs two recipes to generate example and prediction sets.

Table 25: Recipes and Datasets

Recipe	Description	Generated Dataset
Example Dataset	The recipe evaluates your customers' account and contact data, their survey responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses to create an example set (training set) that Einstein learns from.	Example Dataset
Prediction Dataset	The recipe evaluates your customers' account and contact data, their survey responses to customer satisfaction (CSAT) and Net Promoter Score (NPS) survey questions, and the sentiment behind their responses to create a prediction set (scoring set) for which Einstein gets predictions.	Prediction Dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

    Manage Recipes

    Run Data Sync and Recipes to Create and Refresh Datasets

    Einstein Discovery Capacities and Requirements

Customer Churn Predictions

Get predictions about Wealth Management customers who are likely to churn by creating an app using the Customer Churn Risk for Wealth Management template.

By using the Customer Churn Risk for Wealth Management template, you can create an app that provides prediction scores about the likelihood of Wealth Management customers churning.

The app created by using the Customer Churn Risk for Wealth Management template creates three customizable recipes, four datasets, and two dashboards.

Create an App to Identify Wealth Management Customers Likely to Churn

By using the Customer Churn Risk for Wealth Management template, you can create an app that provides prediction scores about the likelihood of Wealth Management customers churning.

Before you use the Customer Churn Risk for Wealth Management template, get the required snapshot datasets by creating an app using the Analytics for Wealth Management template. If you want to use Feedback Management & Sentiment Insights features for predicting customer churn, get the required datasets by creating an app using the Feedback Management & Sentiment Insights Features template.

> ⛔ **Important:** You can create an app by using the Customer Churn Risk for Wealth Management template only when snapshot data is available for at least 30 days.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Customer Churn Risk for Wealth Management** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

   > ✏️ **Note:** Analytics runs a compatibility check of the data in Salesforce.

5. Review the compatibility check results.

   If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

   If the compatibility check completes successfully, click **Looks good, next**.

6. Configure these settings in the next screen:

   a. Select an account app with a snapshot dataset containing past trends.

   b. Select the account app's snapshot dataset for the model to use to determine patterns.

   c. Select a financial account app with a snapshot dataset containing past trends.

   d. Select the financial account app's snapshot dataset for the model to use to determine patterns.

   e. Click **Looks good, next**.

   > ✏️ **Note:** Select snapshot datasets generated by the app that's created by using the Analytics for Wealth Management template.

7. Configure these settings in the next screen:

   a. Select the number of days for which you want to predict the likelihood of customer churn.

   b. Select the record types of accounts for which you want to predict the likelihood of churn.

   c. Select the record types of financial accounts related to the accounts for which you want to predict the likelihood of churn.

   d. Click **Looks good, next**.

8. Configure these settings in the next screen:

   a. Select account statuses that indicate that the account is inactive.

   b. Select account statuses that indicate that the account is active.

   c. Click **Looks good, next**.

9. Specify if you want to include example and prediction sets with Feedback Management and Sentiment Insights features and click **Looks Good, Next**.

10. If you chose to include Feedback Management and Sentiment Insights features, configure these settings in the next screen. Otherwise, move to the next step.

    a. Select the example set generated by the app that's created by using the Feedback Management & Sentiment Insights Features template.

    b. Select the prediction set generated by the app that's created by using the Feedback Management & Sentiment Insights Features template.

11. Enter a name for your app, and then click **Create**.

    📝 Note: The process takes a few minutes.

12. To view your app after the process is completed, refresh the page.

The app now runs preconfigured recipes to generate example, historical, feature, and prediction datasets, and two dashboards.

Recipes, Datasets, and Dashboards

The app created by using the Customer Churn Risk for Wealth Management template creates three customizable recipes, four datasets, and two dashboards.

Recipes and Datasets

The app created by using the Customer Churn Risk for Wealth Management template creates three recipes. The recipes create example, historical, prediction, and predicted score datasets.

Churn Prediction for Wealth Management Customers Dashboard

Show interactive visualizations of predicted churn of Wealth Management customers by adding dashboards to Financial Service Cloud pages.

Recipes and Datasets

The app created by using the Customer Churn Risk for Wealth Management template creates three recipes. The recipes create example, historical, prediction, and predicted score datasets.

Table 26: Recipes and Datasets

Recipe	Description	Output
Wealth Management Churn Example Dataset	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create an example dataset that Einstein learns from. If you chose to include Feedback Management	Example dataset

Recipe	Description	Output
	and Sentiment Insights features when creating the app, the recipe also evaluates the example set containing these features.	
Wealth Management Churn Feature Dataset	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create a historical dataset with details of accounts that were previously likely to churn. The recipe also creates a prediction dataset based on which Wealth Management customers who are likely to churn are identified. If you chose to include Feedback Management and Sentiment Insights features when creating the app, the recipe also evaluates the prediction set containing these features.	• Historical dataset • Prediction dataset
Wealth Management Churn Prediction Dataset	Evaluates the prediction dataset to get the churn score of customers and the top three factors that possibly contribute to churn.	Predicted Score and Top Contributing Factor dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

> Manage Recipes
>
> Run Data Sync and Recipes to Create and Refresh Datasets
>
> Einstein Discovery Capacities and Requirements

Churn Prediction for Wealth Management Customers Dashboard

Show interactive visualizations of predicted churn of Wealth Management customers by adding dashboards to Financial Service Cloud pages.

Churn Prediction for Wealth Management Customers Dashboard

Add this dashboard to the Home page to see predicted churn details for Wealth Management customers. You can filter the prediction data for each branch unit, account, account record type, marketing segment, and account category.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

Churn Prediction for Wealth Management Customers (Embedded) Dashboard

Add this dashboard to any record page to see predicted churn details for a Wealth Management customer. You can filter the prediction data based on the account balance, outstanding credit, and churn score groups.

SEE ALSO:

 Embed Dashboards in Lightning Pages

 Use Wealth Management Customer Churn Prediction Dashboards

Increase Your Assets Under Management from Wealth Management Customers

Identify wealth management customers are likely to add more assets in a specific period. Pursue such customers by pitching products for sale to increase your assets under management.

> 🛑 **Important:** The Likelihood to add assets machine learning model uses several variables to generate predictions, including potentially sensitive personal information such as age and marital status. You can remove or adjust the use of these variables. For more information, see Explain, Predict, and Take Action with Einstein Discovery.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

Sync Your Local Data

The machine learning model requires features from some Salesforce objects.

Create an App to Identify Customers Likely to Add Assets

By using the Customer Likelihood of Adding Assets template, you can create an app that provides prediction scores about the likelihood of Wealth Management customers adding assets.

Recipes, Datasets, and Dashboards

The app created by using the Customer Likelihood of Adding Assets template creates three customizable recipes, three datasets, and a dashboard.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

1. Enable CRM Analytics.

2. Assign admins the required permission sets to create and manage a Financial Services Cloud Analytics app.

3. Assign users the required permission sets to view a Financial Services Cloud Analytics app.

4. Assign Analytics Cloud Integration users the required permission sets.

SEE ALSO:

 Enable CRM Analytics in Financial Services Cloud

 Assign CRM Analytics for Financial Services Administrator Permissions

 Assign CRM Analytics for Financial Services User Permissions

 Grant Permission to the Analytics Integration User

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Sync Your Local Data

The machine learning model requires features from some Salesforce objects.

Add these objects to the data sync:

- Account
- Case
- Contact
- Financial Account
- Financial Account Transaction
- Task

> **Note:** Syncing the Financial Account Transaction and Task objects is optional.

Make sure that you sync these fields:

Object	Field
Account	Account Type
Account	Account Rating
Account	Account Record Type
Account	AUM
Account	Billing Zip/Postal Code
Account	Category
Account	Created Date
Account	Customer Segment
Account	ID
Account	Investment Experience
Account	Investment Objectives
Account	Last Interaction
Account	Last Review
Account	Lifetime Value
Account	Marketing Segment
Account	Name
Account	Primary Contact
Account	Record Type ID
Account	Relationship Length
Account	Relationship Start Date

Object	Field
Account	Review Frequency
Account	Risk Tolerance
Account	Status
Account	Time Horizon
Account	Total AUM Primary Owner
Account	Wallet Share
Branch Unit	Branch Unit ID
Branch Unit	Name
Branch Unit Customer	Account ID
Branch Unit Customer	Branch Unit ID
Branch Unit Customer	Branch Unit Customer ID
Case	Account ID
Case	Age
Case	Closed Date
Case	Created Date
Case	Escalated
Contact	ID
Contact	Annual Income
Contact	Age
Contact	Contact ID
Contact	First Name
Contact	Full Name
Contact	Gender
Contact	Last Name
Contact	Marital Status
Contact	Person Account
Financial Account	Asset Rebalance
Financial Account	Available Credit
Financial Account	Average Balance
Financial Account	Balance Last Statement

Object	Field
Financial Account	Balance
Financial Account	Created Date
Financial Account	Date Closed
Financial Account	Date Opened
Financial Account	Cash Limit
Financial Account	Charges And Fees
Financial Account	Daily Withdrawal Limit
Financial Account	Financial Account Name
Financial Account	FinServ__RecordTypeName__c
Financial Account	Incoming Volume
Financial Account	Insured Amount
Financial Account	Interest Rate
Financial Account	Joint Owner
Financial Account	Last Transaction Date
Financial Account	Loan Amount
Financial Account	Minimum Balance
Financial Account	Minimum Payment
Financial Account	Number of Holdings
Financial Account	Overdraft Allowed
Financial Account	Pending Deposits
Financial Account	Person Account
Financial Account	Premium
Financial Account	Primary Owner
Financial Account	Principal Balance
Financial Account	Product Name
Financial Account	Rebalance Frequency
Financial Account	Record ID
Financial Account	Record Type
Financial Account	Record Type ID
Financial Account	Status

Object	Field
Financial Account	Total Credit Limit
Financial Account	Type
Financial Account	Outgoing Volume
Financial Account	Performance QTD
Financial Account	Performance 1Yr
Financial Account	Performance MTD
Financial Account	Performance YTD
Financial Account	Performance 3Yr
FinServ__ChargesAndFees__c	Record ID
FinServ__ChargesAndFees__c	Annual Account Charge
FinServ__ChargesAndFees__c	Annual Membership Fee
FinServ__ChargesAndFees__c	ATM Fee
FinServ__ChargesAndFees__c	Cash Advance Fee
FinServ__ChargesAndFees__c	Charges And Fees Name
FinServ__ChargesAndFees__c	Foreign Transaction Fee
FinServ__ChargesAndFees__c	ID
FinServ__ChargesAndFees__c	Insufficient Funds Fee
FinServ__ChargesAndFees__c	Late Payment Fee
FinServ__ChargesAndFees__c	Monthly Service Fee
FinServ__ChargesAndFees__c	Overdraft Fees
FinServ__ChargesAndFees__c	Owner ID
FinServ__ChargesAndFees__c	Record ID
FinServ__ChargesAndFees__c	Statement Fee
Product	Active
Product	Product Family
Product	Product ID
Product	Product Name
Record Type	Active
Record Type	Description
Record Type	ID

Object	Field
Record Type	Name
Record Type	Namespace Prefix
Record Type	SObject Type Name
Task	Account ID
Task	Activity Date
Task	Closed
Task	Created Date
Task	High Priority
Task	ID

SEE ALSO:

Add and Remove Local Salesforce Objects and Fields from Data Sync

Create an App to Identify Customers Likely to Add Assets

By using the Customer Likelihood of Adding Assets template, you can create an app that provides prediction scores about the likelihood of Wealth Management customers adding assets.

Before you use the Customer Likelihood of Adding Assets template, get the required snapshot datasets by creating an app using the Analytics for Wealth Management template.

> 🛑 **Important:** You can create an app by using the Customer Likelihood of Adding Assets template only when snapshot data is available for at least 30 days.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Customer Likelihood of Adding Assets** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

   Analytics runs a compatibility check of the data in Salesforce.

5. Perform a step.

   If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

   If the compatibility check completes successfully, click **Looks good, next**.

6. Configure these settings in the Apps and Snapshot Datasets section.

   a. Select an account app with a snapshot dataset containing past trends.

   b. Select the account app's snapshot dataset for the model to use to determine patterns.

   c. Select a financial account app with a snapshot dataset containing past trends.

   d. Select the financial account app's snapshot dataset for the model to use to determine patterns.

    e. Click **Looks good, next**.

> 📝 Note: Select snapshot datasets generated by the app that's created by using the Analytics for Wealth Management template.

7. Configure these settings in the Prediction Duration & Features section:

    a. Select the number of days for which you want to predict the customer likelihood of adding assets.

    b. Enter the amount the customer added to assets in the past. Customers who are likely to add more assets are identified based on the specified amount.

    c. Select the record types of accounts for which you want to predict the customer likelihood of adding assets.

    d. Click **Looks good, next**.

8. Enter a name for your app, and then click **Create**.

The process takes a few minutes.

9. To view your app after the process is completed, refresh the page.

The app now runs preconfigured recipes to create example, prediction, and predicted score datasets, and a dashboard.

Recipes, Datasets, and Dashboards

The app created by using the Customer Likelihood of Adding Assets template creates three customizable recipes, three datasets, and a dashboard.

Recipes and Datasets
The app created by using the Customer Likelihood of Adding Assets template creates three recipes. The recipes create example, prediction, and predicted score datasets.

Add Customer Likelihood of Adding Assets Dashboard to the Home Page
Show predicted asset additions by Wealth Management customers by adding the Customer Likelihood of Adding Assets dashboard to the Home page. You can filter the shows prediction data by assets under management, marketing segment, and wallet share of the customer.

Recipes and Datasets

The app created by using the Customer Likelihood of Adding Assets template creates three recipes. The recipes create example, prediction, and predicted score datasets.

Table 27: Recipes and Datasets

Recipe	Description	Output
Example Dataset to Predict Added Assets	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create an example dataset that Einstein learns from.	Example dataset
Feature Dataset to Predict Added Assets	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create a prediction dataset	Prediction dataset

Recipe	Description	Output
	based on which Wealth Management customers who are likely to add assets are identified.	
Prediction Dataset to Predict Added Assets	Evaluates the prediction dataset to get the prediction score of customers likelihood to buy assets and the top three factors that possibly contribute to asset addition.	Predicted Score and Top Contributing Factor dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

    Manage Recipes

    Run Data Sync and Recipes to Create and Refresh Datasets

    Einstein Discovery Capacities and Requirements

Add Customer Likelihood of Adding Assets Dashboard to the Home Page

Show predicted asset additions by Wealth Management customers by adding the Customer Likelihood of Adding Assets dashboard to the Home page. You can filter the shows prediction data by assets under management, marketing segment, and wallet share of the customer.

SEE ALSO:

    Embed Dashboards in Lightning Pages

    Use the Customer Likelihood of Adding Assets Dashboard

Maximize Your Revenue by Recommending the Right Products to Customers

Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.

🛑 **Important:** Any product recommendations or other output information is not intended to provide specific financial or legal advice. A human being must make any final decision and take account of other factors beyond the product recommendations in making the final decision.

The Product Recommender machine learning model uses several variables to generate predictions, including potentially sensitive personal information such as age and marital status. You can remove or adjust the use of these variables. For more information, see Explain, Predict, and Take Action with Einstein Discovery.

Enable CRM Analytics and Assign Permission Sets

Enable CRM Analytics, assign the required permission sets to your admins, users, and Analytics Cloud Integration users.

1. Enable CRM Analytics.

2. Assign admins the required permission sets to create and manage a Financial Services Cloud Analytics app.

3. Assign users the required permission sets to view a Financial Services Cloud Analytics app.

4. Assign Analytics Cloud Integration users the required permission sets.

SEE ALSO:

    Enable CRM Analytics in Financial Services Cloud

    Assign CRM Analytics for Financial Services Administrator Permissions

    Assign CRM Analytics for Financial Services User Permissions

    Grant Permission to the Analytics Integration User

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Sync Your Local Data

The machine learning model requires features from some Salesforce objects.

Add these objects to the data sync:

- Account
- Case
- Contact
- Financial Account
- Financial Account Transaction
- Task

📝 **Note:** Syncing the Financial Account Transaction and Task objects is optional.

Make sure that you sync these fields:

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

Object	Field
Account	Account Type
Account	Account Rating
Account	Account Record Type
Account	AUM
Account	Billing Zip/Postal Code
Account	Category
Account	Created Date
Account	Customer Segment
Account	ID
Account	Investment Experience
Account	Investment Objectives
Account	Last Interaction
Account	Last Review
Account	Lifetime Value
Account	Marketing Segment
Account	Name
Account	Primary Contact
Account	Record Type ID
Account	Relationship Length
Account	Relationship Start Date
Account	Review Frequency
Account	Risk Tolerance
Account	Status
Account	Time Horizon
Account	Total AUM Primary Owner
Account	Wallet Share
Branch Unit	Branch Unit ID
Branch Unit	Name
Branch Unit Customer	Account ID
Branch Unit Customer	Branch Unit ID

Object	Field
Branch Unit Customer	Branch Unit Customer ID
Case	Account ID
Case	Age
Case	Closed Date
Case	Created Date
Case	Escalated
Contact	ID
Contact	Annual Income
Contact	Age
Contact	Contact ID
Contact	First Name
Contact	Full Name
Contact	Gender
Contact	Last Name
Contact	Marital Status
Contact	Person Account
Financial Account	Asset Rebalance
Financial Account	Available Credit
Financial Account	Average Balance
Financial Account	Balance Last Statement
Financial Account	Balance
Financial Account	Created Date
Financial Account	Date Closed
Financial Account	Date Opened
Financial Account	Cash Limit
Financial Account	Charges And Fees
Financial Account	Daily Withdrawal Limit
Financial Account	Financial Account Name
Financial Account	FinServ__RecordTypeName__c
Financial Account	Incoming Volume

Object	Field
Financial Account	Insured Amount
Financial Account	Interest Rate
Financial Account	Joint Owner
Financial Account	Last Transaction Date
Financial Account	Loan Amount
Financial Account	Minimum Balance
Financial Account	Minimum Payment
Financial Account	Number of Holdings
Financial Account	Overdraft Allowed
Financial Account	Pending Deposits
Financial Account	Person Account
Financial Account	Premium
Financial Account	Primary Owner
Financial Account	Principal Balance
Financial Account	Product Name
Financial Account	Rebalance Frequency
Financial Account	Record ID
Financial Account	Record Type
Financial Account	Record Type ID
Financial Account	Status
Financial Account	Total Credit Limit
Financial Account	Type
Financial Account	Outgoing Volume
Financial Account	Performance QTD
Financial Account	Performance 1Yr
Financial Account	Performance MTD
Financial Account	Performance YTD
Financial Account	Performance 3Yr
FinServ__ChargesAndFees__c	Record ID
FinServ__ChargesAndFees__c	Annual Account Charge

Object	Field
FinServ__ChargesAndFees__c	Annual Membership Fee
FinServ__ChargesAndFees__c	ATM Fee
FinServ__ChargesAndFees__c	Cash Advance Fee
FinServ__ChargesAndFees__c	Charges And Fees Name
FinServ__ChargesAndFees__c	Foreign Transaction Fee
FinServ__ChargesAndFees__c	ID
FinServ__ChargesAndFees__c	Insufficient Funds Fee
FinServ__ChargesAndFees__c	Late Payment Fee
FinServ__ChargesAndFees__c	Monthly Service Fee
FinServ__ChargesAndFees__c	Overdraft Fees
FinServ__ChargesAndFees__c	Owner ID
FinServ__ChargesAndFees__c	Record ID
FinServ__ChargesAndFees__c	Statement Fee
Product	Active
Product	Product Family
Product	Product ID
Product	Product Name
Record Type	Active
Record Type	Description
Record Type	ID
Record Type	Name
Record Type	Namespace Prefix
Record Type	SObject Type Name
Task	Account ID
Task	Activity Date
Task	Closed
Task	Created Date
Task	High Priority

Object	Field
Task	ID

SEE ALSO:

Add and Remove Local Salesforce Objects and Fields from Data Sync

Create an App to Recommend Products with Clustering Transformation

Use the Basic AI for Product Recommendations template to create a custom app that has fields and data that you want to use for developing your prediction model. This template uses clustering transformation and doesn't require snapshot data in Salesforce. It also creates account and financial account snapshot datasets.

Create an App With the Advanced AI for Product Recommendations Template

With the Advanced AI for Product Recommendations template, you can create an app that provides product purchases scores for customers.

Advanced AI Template Recipes, Datasets, and Dashboards

The app created by using the Advanced AI for Product Recommendation template creates four customizable recipes, four datasets, and three dashboards.

Create an App With the Advanced AI for Product Recommendations Template

With the Advanced AI for Product Recommendations template, you can create an app that provides product purchases scores for customers.

Before you use the Advanced AI for Product Recommendations template, get the required snapshot datasets by creating an app using the Analytics for Retail Banking template or the Basic AI for Product Recommendations template.

🛑 **Important:** You can create an app by using the Advanced AI for Product Recommendations template only when snapshot data is available for at least 30 days.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Advanced AI for Product Recommendations** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

   Analytics runs a compatibility check of the data in Salesforce.

5. Perform a step.

   If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

   If the compatibility check completes successfully, click **Looks good, next**.

6. Configure these settings in the next screen:

   a. Select an account app with a snapshot dataset containing past trends.

   b. Select the account app's snapshot dataset for the model to use to determine patterns.

   c. Select a financial account app with a snapshot dataset containing past trends.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

EDITIONS

d. Select the financial account app's snapshot dataset for the model to use to determine patterns.

e. Click **Looks good, next**.

> 📝 Note: Select snapshot datasets generated by the app that's created by using the Analytics for Retail Banking template or the Basic AI for Product Recommendations template.

7. Configure these settings in the next screen.

a. Select the number of days for which you want the product recommendations.

b. Select the record types of accounts for which you want the product recommendations.

c. Select the record types of financial accounts related to the accounts for which you want the product recommendations.

d. Click **Looks good, next**.

8. Configure these settings in the next screen:

a. Select account statuses that indicate that the account is active.

b. Select financial account statuses that indicate that the financial account is active.

c. Click **Looks good, next**.

9. Enter a name for your app, and then click **Create**.

The process takes a few minutes.

10. To view your app after the process is completed, refresh the page.

The app now runs preconfigured recipes to feature, example, prediction, and predicted score datasets, and three dashboards.

Advanced AI Template Recipes, Datasets, and Dashboards

The app created by using the Advanced AI for Product Recommendation template creates four customizable recipes, four datasets, and three dashboards.

[Advanced AI Template Recipes and Datasets](#)

The app created by using the Advanced AI for Product Recommendation template creates four recipes. The recipes create feature, example, prediction, and predicted score datasets.

[Add the Advanced Product Recommendation Dashboards to Lightning Pages](#)

Show interactive visualizations of recommended products predicted by using snapshot data in Salesforce by adding dashboards to Financial Service Cloud pages.

Advanced AI Template Recipes and Datasets

The app created by using the Advanced AI for Product Recommendation template creates four recipes. The recipes create feature, example, prediction, and predicted score datasets.

Table 28: Recipes and Datasets

Recipe	Description	Output
Account Record Type & Product Dataset	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create a dataset that combines	Account Record Type & Product dataset

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

Recipe	Description	Output
	financial account data and account data for specific record types and products.	
Example Dataset	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create an example dataset that Einstein learns from.	Example dataset
Prediction Dataset	Evaluates account snapshot data, financial account snapshot data, and data from configured objects to create a prediction dataset for which product recommendations are predicted.	Prediction dataset
Product Purchase Score & Predictors Dataset	Evaluates the prediction dataset to get product recommendation score and top predictors that encourage customers to purchase products.	Purchase Score & Predictors dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

 Manage Recipes

 Run Data Sync and Recipes to Create and Refresh Datasets

 Einstein Discovery Capacities and Requirements

Add the Advanced Product Recommendation Dashboards to Lightning Pages

Show interactive visualizations of recommended products predicted by using snapshot data in Salesforce by adding dashboards to Financial Service Cloud pages.

Product Recommendations for Top Customers (Advanced AI) Dashboard

Add this dashboard to the Home page. The dashboard shows recommended products for customers. You can filter the prediction data for each branch, account, account record type, account category, marketing segment, and measure.

Top Customer Recommendations (Advanced AI) Dashboard

Add this dashboard to the account record page on the product record pages. The dashboard shows customers who are likely to buy that product.

Top Product Recommendations (Advanced AI) Dashboard

Add this dashboard to the account record page on the account record pages. The dashboard shows recommended products for that account.

SEE ALSO:

   Embed Dashboards in Lightning Pages

   Use the Advanced Product Recommendation Dashboards

Create an App to Recommend Products with Snapshot Data

Use the Advanced AI for Product Recommendations template to create a custom app that has fields and data that you want to use for developing your prediction model. This uses existing snapshot data in Salesforce.

Create an App With the Basic AI for Product Recommendations Template

With the Basic AI for Product Recommendations template, you can create an app that provides product purchases scores for customers.

Basic AI Template Recipes, Datasets, and Dashboards

The app created by using the Basic AI for Product Recommendation template creates four customizable recipes, four datasets, and three dashboards.

Create an App With the Basic AI for Product Recommendations Template

With the Basic AI for Product Recommendations template, you can create an app that provides product purchases scores for customers.

1. In Analytics Studio, click **Create**, and then select **App**.

2. Select the **Basic AI for Product Recommendations** template, and then click **Continue**.

3. Review the preview page, and then click **Continue**.

4. Choose to create an app or to use settings from an existing app, and then click **Continue**.

   Analytics runs a compatibility check of the data in Salesforce.

5. Perform a step.

   If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.

   If the compatibility check completes successfully, click **Looks good, next**.

6. Configure these settings in the next screen.

   a. Select the record types of accounts for which you want to predict the likelihood of churn.

   b. Select the record types of financial accounts related to the accounts for which you want to predict the likelihood of churn.

   c. Click **Looks good, next**.

7. Configure these settings in the next screen.

   a. Select account statuses that indicate that the account is active.

   b. Select financial account statuses that indicate that the financial account is active.

   c. Click **Looks good, next**.

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EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

</div>

8. Enter a name for your app, and then click **Create**.

    The process takes a few minutes.

9. To view your app after the process is completed, refresh the page.

This app runs preconfigured recipes to create feature, account snapshot, financial account snapshot, and predicted datasets, and three dashboards.

Basic AI Template Recipes, Datasets, and Dashboards

The app created by using the Basic AI for Product Recommendation template creates four customizable recipes, four datasets, and three dashboards.

Basic AI Template Recipes and Datasets

The app created by using the Basic AI for Product Recommendation template creates four recipes. The recipes create account, account snapshot, financial account snapshot, and predicted score datasets.

Add the Basic Product Recommendation Dashboards to Lightning Pages

Show interactive visualizations of recommended products predicted by using clustering transformation by adding dashboards to Financial Service Cloud pages.

Basic AI Template Recipes and Datasets

The app created by using the Basic AI for Product Recommendation template creates four recipes. The recipes create account, account snapshot, financial account snapshot, and predicted score datasets.

Table 29: Recipes and Datasets

Recipe	Description	Output
Clustered Account Dataset	Evaluates data from configured objects to create an account dataset by using the clustered transformation.	Clustered Account dataset
Account Snapshot Dataset	Evaluates data from configured objects to create an account snapshot dataset.	Account Snapshot dataset
Financial Account Snapshot Dataset	Evaluates account snapshot dataset and data from configured objects to create a financial account snapshot dataset.	Financial Account Snapshot dataset
Product Purchase Score & Predictors Dataset	Evaluates the clustered account dataset, financial account snapshot dataset, and data from configured objects to get product recommendation score and the top predictors that encourage customers to purchase products.	Purchase Score & Predictors dataset

You can modify the recipes in these scenarios:

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The usage of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

> Manage Recipes
>
> Run Data Sync and Recipes to Create and Refresh Datasets
>
> Einstein Discovery Capacities and Requirements

Add the Basic Product Recommendation Dashboards to Lightning Pages

Show interactive visualizations of recommended products predicted by using clustering transformation by adding dashboards to Financial Service Cloud pages.

Product Recommendations for Top Customers (Basic AI) Dashboard

Add this dashboard to the Home page. The dashboard shows recommended products for customers. You can filter the prediction data for each branch, account, account record type, product, and marketing segment.

Top Customer Recommendations (Basic AI) Dashboard

Add this dashboard to the product record pages. The dashboard shows customers who are likely to buy that product. You can filter the prediction data for each measure.

Top Product Recommendations (Basic AI) Dashboard

Add this dashboard to the account record pages. The dashboard shows a list of recommended products for that account

SEE ALSO:

> Embed Dashboards in Lightning Pages
>
> Use the Basic AI Product Recommendations Dashboards

Scoring Framework Predictions

Pitch the right products to customers and boost your revenue by analyzing customers' likelihood of purchasing financial assets. Decrease customer attrition by taking steps based on the customer's likelihood of churning. Sell an asset to an interested customer based on predictions and increase your customer's assets under management. Get prediction scores based on the data of your accounts and contacts.

To get predictions about customers' likelihood of purchasing financial assets, likelihood of churning, or likelihood of adding assets, create a CRM Analytics template configuration in Scoring Framework with Prediction Scores (Financial Services Cloud) as the template configuration type.

- If you want to define a predefined target variable to get predictions about customers' likelihood of purchasing financial assets, select **Accounts Have Newly Purchased Financial Accounts (Likelihood to Purchase)** or **Accounts Have Associated Opportunities That Are Closed (Likelihood to Purchase)**.

- If you want to define a predefined target variable to get predictions about customers' likelihood of churning, select **Account Status Has Changed to Inactive (Likelihood to Churn)**.

- If you want to define a predefined target variable to get predictions about customers' likelihood of adding assets, select **Assets Under Management Have Increased for Accounts (Likelihood to Add Assets)**.

To get predictions based on the data of your accounts and contacts, create a CRM Analytics template configuration in Scoring Framework with Prediction Scores for Accounts or Contacts (Financial Services Cloud) as the template configuration type and define a custom target variable.

The apps created based on the template configuration contain these preconfigured recipes.

Recipe	Description	Output
Get Data to Generate Example Dataset	The recipe creates a dataset that's used to generate an example dataset by evaluating account snapshot data, financial account snapshot data, tasks, events, cases, and data from the object selected to train the model.	Example Dataset
Get Example Dataset	The recipe creates a dataset that Einstein learns from by evaluating account snapshot data, financial account snapshot data, the dataset created by the Get Data to Generate Example Dataset recipe, and data from the object selected to train the model.	Example Dataset
Prediction Dataset	The recipe creates a dataset based on which Einstein generates predictions by evaluating financial accounts, financial account charges and fees, leads, tasks, cases, and data from the object that you want to get predictions for.	Prediction Dataset
Get Financial Services Cloud Predictions	The recipe generates predictions and the top three factors that possibly impact the predictions by evaluating the prediction dataset.	Writes prediction details and the top three predictors to the writeback object's field that's selected when setting up the template configuration in Scoring Framework.

You can modify the recipes in these scenarios.

- Your schema deviates from the Financial Services Cloud schema.
- A custom field of an existing entity changes.
- The storage of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

Create and Set Up a CRM Analytics Template Configuration for Predictions

Manage Recipes

Scoring Framework Predictions on Actionable Lists

Create an actionable list of the customers to prioritize and show the relevant predictions that Scoring Framework generates on the list so that you can focus on the right customers.

When setting up the CRM Analytics template configuration for your use case in Scoring Framework, select an object and field to store the prediction score. Create an actionable list definition with the Data Processing Engine definition containing a data source node for the object and field that store the prediction score.

Example: A financial institution uses Scoring Framework to predict the likelihood of customers churning. The financial institution's Salesforce admin creates a CRM Analytics template configuration in Scoring Framework to get these predictions and store them in a custom field, Churn Score, on the Account object.

The admin then creates an actionable list definition to generate an actionable list for high-priority customers who are likely to churn. When setting up the related Data Processing Engine definition, the Salesforce admin makes sure that there's a data source node for the Account object and the Churn Score field. Now, the financial institution tries to decrease customer attrition by taking steps based on the customer's likelihood of churning.

SEE ALSO:

Set Up Actionable List Definitions

Salesforce Scheduler

With Lightning Scheduler, you can provide personalized experiences to your customers or prospects by precision-scheduling appointments—in person or by phone or video—with the right person at the right place and time. You can easily embed appointment scheduling into standard Salesforce workflows, such as leads and referrals, opportunities, and accounts.

SEE ALSO:

Salesforce Help: Manage Appointments with Lightning Scheduler

Securing Your Data with Salesforce Shield

Salesforce Shield—a set of security tools that helps you protect data at rest, monitor usage, and prevent malicious activity—is fully supported. If you implement Shield, remember these considerations when securing your confidential client data using Platform Encryption, event monitoring, and Field Audit Trail.

We strongly recommend that you first review the Salesforce online help to understand how the Salesforce Shield security tools work. Use that information along with these important considerations when implementing security for Financial Services Cloud.

> Note: Financial Services Cloud doesn't support Classic Encryption, for example, for data masking in components. To know more about the differences between Classic Encryption and Salesforce Shield, see What's the Difference Between Classic Encryption and Shield Platform Encryption?

Considerations for Shield Platform Encryption

Shield Platform Encryption gives your data a whole new layer of security while preserving critical platform functionality. The data you select is encrypted at rest, to help your firm confidently comply with privacy policies, regulatory requirements, and contractual obligations for handling private data. All Financial Services Cloud objects and fields are fully compliant with Shield Platform Encryption, excluding the restrictions in Financial Services Cloud Availability and Limitations.

Considerations for Monitoring User Activity with Event Log Files

Event log files contain the granular details of user activity. Information about these user activities, known as *events*, let you swiftly identify abnormal behavior and safeguard data. Refer to these considerations when retrieving event log files that are stored in the EventLogFile API object.

Considerations for Shield Platform Encryption

Shield Platform Encryption gives your data a whole new layer of security while preserving critical platform functionality. The data you select is encrypted at rest, to help your firm confidently comply with privacy policies, regulatory requirements, and contractual obligations for handling private data. All Financial Services Cloud objects and fields are fully compliant with Shield Platform Encryption, excluding the restrictions in Financial Services Cloud Availability and Limitations.

SEE ALSO:

Strengthen Your Data's Security with Shield Platform Encryption

Financial Services Cloud Availability and Limitations

Considerations for Monitoring User Activity with Event Log Files

Event log files contain the granular details of user activity. Information about these user activities, known as *events*, let you swiftly identify abnormal behavior and safeguard data. Refer to these considerations when retrieving event log files that are stored in the EventLogFile API object.

All Financial Services Cloud activities are tracked as standard event types.

SEE ALSO:

Using Event Monitoring

Using Event Monitoring

Marketing Cloud Engagement

Create and send emails using Marketing Cloud Engagement for Financial Services Cloud. Use the customizable email templates to save time and send personalized emails to your clients. Synchronize your Salesforce data with Marketing Cloud so that you always have the most up-to-date client information in your emails.

This feature requires Marketing Cloud Engagement for Industries Version 1.9 or later, available for download on the Installer page.

SEE ALSO:

> *Salesforce Help*: Marketing Cloud Engagement for Financial Services Cloud

Connect to Customers with Account Engagement in Financial Services Cloud

Access Marketing Cloud Account Engagement (Pardot), a full suite of marketing tools, in Financial Services Cloud.

Create groups and relationships in Financial Services Cloud to sync to Account Engagement as the underlying Account and Contact records. You can map Financial Services Cloud custom objects such as Financial Account to Account Engagement custom objects.

If you use person accounts in your org, there are no changes to the way you work in Account Engagement.

If you use the individual data model, send 1:1 Salesforce Engage emails via the Contact list view in Lightning Experience or through the Contact record. In the individual data model, you see Account Engagement Contact fields and Visualforce pages in the Contact section on the client profile, but contact-specific buttons such as Send Engage Email aren't visible.

SEE ALSO:

> Market to Your Customers with Account Engagement
> Person Account Syncing with Salesforce

Support Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get customer-submitted information such as W2 forms, tax returns, or other financial documents faster using the Intelligent Form Reader.

When a user uploads a document, Financial Services Cloud creates a record for that document. And then it allows the user to extract data from the document using an optical character recognition (OCR) process that runs in the background. You can use action plan templates to automatically attach the scanned document to a document checklist item or trigger a flow.

To make Intelligent Document Automation available to your users, identify the kinds of documents they're working with and decide how to handle the data from those documents.

How Document Management Works and Considerations

- The document management process begins when a user uploads a PDF, JPG or PNG file to Financial Services Cloud.

How Intelligent Form Reader Works and Considerations

- You can map form fields to a target object's record type fields from October 19, 2022. However, for Financial Services Cloud, we support only the "Default" record types to store the information extracted from each form.

- Any old mappings created before October 19, 2022 are automatically set to "Default Record type".

- Map Form fields to only one target object.

- The extracted data is mapped to Salesforce objects as defined by the admin.

- The OCR Document Scan Result object contains financial information, such as account details or employment history, extracted from documents used in the loan application. The `ExtractedValues` field in this object can be encrypted.

- In PDF files, optical character recognition doesn't extract data from Acrobat fillable fields. To extract this data, convert the PDF to a static or flat document by printing it as a new PDF.

- Resend the document if the OCR extraction fails.

Set Up Intelligent Document Automation
Assign permissions to users who process mortgage applications, typically loan officers. Create the document types used to process mortgage applications. For example, create a residential loan application document type that you can use when defining the data extraction fields.

Set Up Intelligent Document Automation

Assign permissions to users who process mortgage applications, typically loan officers. Create the document types used to process mortgage applications. For example, create a residential loan application document type that you can use when defining the data extraction fields.

1. If you process PDF files, turn on the alternate file previews option in Salesforce File Settings.

From Setup, in the Quick Find box, enter *General Settings*, then select **General Settings** and click **Display alternative file previews**.

2. Turn on Document Checklist.

From Setup, in the Quick Find box, enter `Document Checklist Settings`, and select **Document Checklist Settings**, then move the **Checklist Items with Attachments** slider to **On**.

3. Assign the permissions and permissions sets that your users require to work with forms.

    a. Assign the Document Checklist license to the users or groups that work with the forms.

        For example, for mortgages, users typically are loan officers.

    b. From Setup, in the Quick Find box, enter `Permission Sets`, select **Permission Sets**, and then select **Document Checklist**.

    c. Click **Manage Assignments** > **Add Assignments**, select your users and click **Assign**.

4. For mortgage applications, create a document type.

    a. From Setup, in the Quick Find box, enter `Document Type`, and select **Document Type** and then click **New Document Type**. Give your document type a label and name, such as Residential Loan Application, then save it.

        Repeat the steps to create document types for any source data that you work with.

Intelligent Form Reader

Intelligent Form Reader provides optical character recognition to automatically extract data from financial documents. You specify the data's source form, then map the fields in the form to the equivalent fields in Salesforce. Use the extracted information to create or update record fields or to verify existing data. For example, check a birthdate in Salesforce against the birthdate in a scanned passport.

> 📝 **Note:** To use Intelligent Form Reader features with your AWS account, use Intelligent Document Reader. For more information, see Intelligent Document Reader on page 774.

> 📝 **Note:** Amazon Textract Analyze ID is not compatible with Intelligent Form Reader and Intelligent Document Reader for Financial Services Cloud. If the setting is turned on, the data may not be extracted.

Intelligent document automation works with PDF, JPG, and PNG image files. The extracted data is mapped to the Salesforce objects that you define.

To add form types, create another document type on page 768 and specify the form type.

> ⛔ **Important:** The `ExtractedValues` field in the OCR Document Scan Result object can be encrypted. It contains applicant information such as income or account details extracted from documents used in the loan application process.

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EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

USER PERMISSIONS

Intelligent Form Reader

-

</div>

Enable Intelligent Form Reader
Intelligent Form Reader provides optical character recognition for data extraction using Amazon Textract.

Map Form Types to Objects
Specify the data object where you want to store the information for each type of incoming form.

Set Up Data Extraction
Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

Enable Intelligent Form Reader

Intelligent Form Reader provides optical character recognition for data extraction using Amazon Textract.

Before you enable Intelligent Form Reader:

- Make sure you understand how Intelligent Form Reader works and its considerations on page 768.
- Assign permission to users and create document types on page 768 that you require.

1. Turn on Intelligent Form Reader.

   From Setup, in the Quick Find box, enter `Intelligent Form Reader`, and select **Intelligent Form Reader**, and then move the Enable Intelligent Form Reader slider to **On**.

Map Form Types to Objects

Specify the data object where you want to store the information for each type of incoming form.

1. On the Intelligent Form Reader setup page, click **New Mapping**.

2. Give your matched form and object a name, such as Residential Loan Form Data.

3. For Form, choose the data's source document. For this example, try Residential Loan Application. The values listed in the dropdown are created when you define a document type on page 768.

   You want to set up a similar document type on page 768 for each kind of form you expect to receive for mortgage applications. For example, consider creating Employment Details, Account Details, and Income Details.
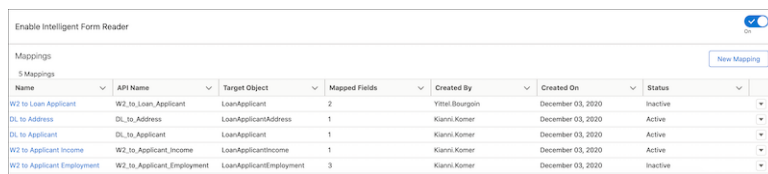
   > 📝 **Note:** Only one mapped form type to target object pair can be active at a time.

   a. If you select the Form Type as `Custom Form`, then you can browse and upload the required forms. Selecting a custom form lets you automate the form field extraction process. Intelligent Form Reader extracts the form fields and displays in your mapping definition. Then you can specify the target object fields to map them to.

      You can upload a maximum of five forms of 5 MB each in the supported formats, such as *.jpg, *.jpeg, *.png, *.pdf.

4. For Target Object, select the Salesforce object where the data is stored.
   For example, some data on a mortgage form that identifies the loan applicant, such as name and address, goes in the Contact object.

   > 💡 **Tip:** Each user sees a list of objects to choose from according to their access level. Review the permissions assigned to your users and ensure they see all the objects that they need.

Set Up Data Extraction

Map the fields in the incoming form to the equivalent fields in the appropriate Salesforce data object.

Upload custom forms that the Intelligent Form Reader uses to extract the form fields into your mapping definition. Or you can design your mapping definition by manually defining the form fields. Then map the form fields to the target object fields.

Auto-Extract Fields from Custom Forms
Use custom forms to automate form field extraction.

Manually Configure Data Extraction
Map the fields in an incoming form to the equivalent fields in the appropriate Salesforce data object.

Reuse a sample document to populate the fields already extracted when creating another mapping from the same document.

You can opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.
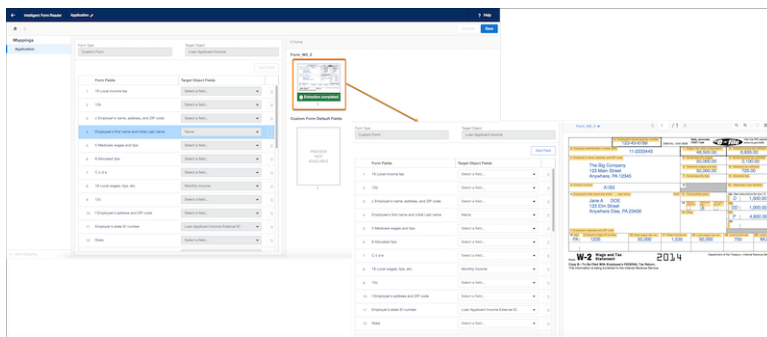
Auto-Extract Fields from Custom Forms

Use custom forms to automate form field extraction.

Map Extracted Fields to Target Object Fields

In the mapping definition page, the extracted custom form appears as a thumbnail with the extraction status details. The auto-extracted fields appear in the Form Fields column. In the Target Object Fields column, select the fields that you want to map the form fields to.

Navigation Across Custom Forms and Custom Form Pages

For a mapping created using a custom form, each form page appears as a thumbnail. Click any thumbnail to expand and view the full page. Expanding a thumbnail also populates the Form Fields column with the fields extracted from the selected page.

To navigate across custom forms, select another form from the dropdown above the page view. Use the previous or next buttons to navigate between the selected custom form pages.

You can change the view from thumbnail to a list view or use zoom options

The fields that are highlighted on the page and in the form field rows help in two-way intuitive navigation for mapping.

Manage Your Mappings

To add more custom forms to an existing mapping, use the append icon in the top left . Then from the dropdown above the page view, choose a form for mapping.

Click the delete icon to delete an existing mapping. You can't recover a deleted mapping.

Manually Configure Data Extraction

Map the fields in an incoming form to the equivalent fields in the appropriate Salesforce data object.

1. Click **Add Field**.

2. For Form Field, specify a kind of data in the incoming form such as Name of the loan applicant.

3. Under Target Object Fields, choose the field in the Salesforce object that matches the field in the incoming form.
   For example, if there's a Name field in the incoming form, choose Name in the Contact object.

Note: You can't change a target object after it's set.

For multiple fields with duplicate values such as a phone number, an alert appears when the users start data extraction. They can then choose which value to map to a field. For example, when a form contains phone numbers of the primary and the co-applicant, the user can specify which phone number to map to which phone field in Salesforce.

4. After you add the keys that you need, save your work and then click **Activate**.

Now your users can upload documents into Financial Services Cloud and the data is automatically extracted into Salesforce data objects. View the scanned pages and content records for the document on the OCR Document Scan Result related list.

Reuse Mappings for Document Type

Reuse a sample document to populate the fields already extracted when creating another mapping from the same document.

A default mapping is available for each mapping definition. You can use the default mapping definition in the absence of any sample document. The default mapping contains custom fields defined for a document type that are shared across mapping definitions. You can reuse previous mappings because the fields get automatically associated with the document type.

Save Partial Mappings

You can opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.

Financial Services Cloud Intelligent Document Reader

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the form, upload the form, and map the form's fields to a Salesforce object's fields. For example, you can specify that a customer's asset amount in a bank statement must be stored in the Amount field of the account's AssetsAndLiabilities record. The extracted information can be used to create or update record fields, or to verify data that's already in the org. For example, you can check a person's birth date against the birth date in their scanned passport.

📝 **Note:** Amazon Textract Analyze ID is not compatible with Intelligent Form Reader and Intelligent Document Reader for Financial Services Cloud. If the setting is turned on, the data isn't extracted.

For more information, see Intelligent Document Reader.

Einstein Bots

Provide customers with intelligent, self-service bots. With Einstein Bots, you can launch a fully featured bot that integrates with your Salesforce data in a few clicks! Bots can automate your company's frequent tasks, increasing your deflection rate and freeing up agents for more complicated requests.

Deploy Einstein Bots for Financial Services Cloud

Einstein Bots for Financial Services Cloud help resolve top customer issues quickly, reducing call volume to save your company time and money. A chatbot is an application that conducts a conversation, either aloud or through text. They can complement the support-chat experience, greeting customers and directing them to get answers fast

Test-Drive Einstein Bots for Financial Services Cloud

Launch the sample Einstein Bots through Embedded Service to see how chatbots can work for your customers. You can then use the sample data included to test the use cases of a reported lost card and registering an international travel plan.

Deploy Einstein Bots for Financial Services Cloud

Einstein Bots for Financial Services Cloud help resolve top customer issues quickly, reducing call volume to save your company time and money. A chatbot is an application that conducts a conversation, either aloud or through text. They can complement the support-chat experience, greeting customers and directing them to get answers fast

Pre-Deployment Tasks for Einstein Bots for Financial Services Cloud

Complete the following tasks before deploying Einstein Bots for Financial Services Cloud.

Download and Deploy Einstein Bots for Financial Services Cloud

You can download and deploy the bot in two ways.

Post-Deployment Tasks for Einstein Bots for Financial Services Cloud

Configure the deployed package to get your bots up and running.

Considerations for Removing Einstein Bots for Financial Services Cloud

Before removing the Einstein Bots for Financial Services Cloud package, you must revoke the permission sets assigned to the bot. Also, you must undo the configuration that determines the name of the chat button in the landing page.

SEE ALSO:

Salesforce Help: Einstein Bots

Pre-Deployment Tasks for Einstein Bots for Financial Services Cloud

Complete the following tasks before deploying Einstein Bots for Financial Services Cloud.

1. Enable Chat

Before you customize Chat, you must create the basic Chat implementation for your Salesforce org. After you complete the basic setup steps, you have a functioning Chat implementation that your agents can use to chat with customers.

> 📝 **Note:** If Chat is already enabled, you do not need to enable it again.

2. Enable Einstein Bots

On the Einstein Bots setup page, enable bots, manage settings, and view and access your list of bots.

> 📝 **Note:** If Einstein Bots are already enabled, you do not need to enable them again.

SEE ALSO:

Salesforce Help: Chat with Customers on Your Website

Download and Deploy Einstein Bots for Financial Services Cloud

You can download and deploy the bot in two ways.

1. Use a direct URL to the package.

To do this task, complete the instructions that follow in this topic.

2. Download the package from AppExchange.

The URL for the AppExchange listing is https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FK9UYUA1. Follow the instructions in Install a Package.

To download the bot package using a direct URL:

1. Copy `https://industries.secure.force.com/einsteinbotsforfinancialservicescloud` into your browser, and press **Enter**.

2. If you received a password from Salesforce, enter it.

3. Depending on your requirement, select either **Install for Admin Profiles** or **Install**.

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

Confirm that the deployment is successful in your org's setup.

1. From Setup, enter Installed Packages in the Quick Find box, then select **Installed Packages**.

2. In the Installed Packages section, select **Einstein Bots for Financial Services Cloud**.

Post-Deployment Tasks for Einstein Bots for Financial Services Cloud

Configure the deployed package to get your bots up and running.

Set Up Test Data

Setting up test data involves:

- Setting up Chat
- Assigning permission sets to the bot
- Deploying test data to your Salesforce org

🛑 **Important:** These steps deploy test data to your Salesforce org. We recommend that you perform this operation only in a test environment.

📝 **Note:** Before you begin, add your Salesforce org's URL to your remote site setting.

To set up test data for the bots:

1. In your Salesforce org, from the App Launcher (⠿), find and open **FSC Einstein Bots Manager**.
2. On the Getting Started tab, in the Data Setup section, click **Chat Setup**, and follow the on-screen instructions.
3. In the Data Setup section, click **Assign Bot PermSet**, and follow the on-screen instructions.
4. In the Data Setup section, click **Create FscBot Test Data**, and follow the on-screen instructions.

Train Einstein Bots for Financial Services Cloud

The customer's reason for interacting with your bot, such as reporting a lost card or registering an international travel plan, is called an intent. You associate an intent with a dialog. You then train the bot to create a learning model that your bot can use to understand the intents.

If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want. For example, a Report Lost Card dialog has an associated intent that trains the bot to understand the many ways that a customer could express the need to report a lost card.

1. From Setup, search for `Einstein Bots` in the Quick Find box, and click **Einstein Bots**.
2. In the My Bots section, select **Einstein Bots for Financial Services Cloud**.
3. From the Bot Builder menu in the top left, switch to the Overview page, and click **Edit**.
4. Click **Build Model**, and follow the on-screen instructions.

   The bot training could take a while. In the meantime, you can complete the other steps. Your bot is trained when the Status field shows Succeeded and the Complete % shows 100%.

Set Up Org-Wide Email Addresses and Salesforce Sites

You can define and manage org-wide and no-reply addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the org-wide address for the email's From address. Replies are delivered to the defined no-reply address. These configurations are required to send emails with verification codes to customers.

Salesforce Sites enables you to create public websites and apps that are directly integrated with your Salesforce org and don't require users to log in with a username and password.

1. Create an org-wide email address and verify it.
2. From Setup, search for `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.
3. Select **FscBot_Settings**, and click **Manage Records**.

4. Find `BotOrgWideEmailAddress`, and update its value with the org-wide email address that you created.

5. Find `NoReplyEmailAddress`, and update its value with the no-reply email address for your org. If you don't have a no-reply email address, you can provide any valid email address.

6. If you don't have a Salesforce site, register for one.

7. To test the bot, add the FSCBot_Landing Visualforce page to your site.

Configure the Chat Button

Give the chat button that is displayed on the landing page a name.

📝 Note: Perform these steps in Salesforce Classic.

1. From Setup, search for `Chat Buttons & Invitations` in the Quick Find box, and click **Chat Buttons & Invitations**.

2. Select **FSC Chat Button**, and click **Edit**.

3. In the Einstein Bots Settings section, set `Einstein Bots Configuration` to `Einstein Bots for FSC`.

Configure the Site Endpoint for Snap-Ins

Link your Salesforce site to a snap-in.

1. From Setup, search for `Snap-ins` in the Quick Find box, and click **Snap-ins**.

2. Click **New Deployment**.

3. Give the snap-in deployment a name.

4. In the Site Endpoint dropdown list, select your Financial Services Cloud site.

5. Save your changes.

6. In the Chat Settings section, click **Start**.

7. In the Chat Deployment dropdown list, select **Einstein Bots for Financial Services Cloud**.

8. In the Chat Button dropdown list, select **Chat Button for Einstein FSC Bots**.

9. Save your changes.

Configure the Landing Page with a Snap-In

Configure the landing page to embed the bot snap-in.

1. From Setup, search for `Snap-ins` in the Quick Find box, and click **Snap-ins**.

2. Select the snap-in that you created, and click **View**.

3. Click **Get Code**.

4. Copy the chat code snippet.

5. From Setup, search for `Visualforce Pages` in the Quick Find box, and click **Visualforce Pages**.

6. Select the **FscBot_Landing Visualforce** page, and click **Edit**.

7. In the Visualforce Markup tab, paste the code snippet just before the closing body tag (`</body>`).

8. Save your changes.

Activate and Launch Einstein Bots for Financial Services Cloud

Activate the bot before you can start chatting with it from the landing page.

🛑 Important: Before you begin, the bot training that you initiated must have completed successfully.

1. From Setup, search for `Einstein Bots` in the Quick Find box, and click **Einstein Bots**.

2. In the My Bots section, select **Einstein Bots for Financial Services Cloud**.

3. From the Bot Builder menu in the top left, switch to the Overview page.

4. Click **Activate**.

5. Go to <YOUR_SITE_URL>/FSCBot_Landing, and chat with your bot using snap-ins. <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

Considerations for Removing Einstein Bots for Financial Services Cloud

Before removing the Einstein Bots for Financial Services Cloud package, you must revoke the permission sets assigned to the bot. Also, you must undo the configuration that determines the name of the chat button in the landing page.

> ⊘ Important: Be sure to complete the steps described in this topic *before* removing the bot package.
>
> To remove the bot package, follow the instructions in Uninstall a Managed Package.

1. In your Salesforce org, from the App Launcher (⸬), find and open **FSC Einstein Bots Manager**.

2. On the Getting Started tab, in the Data Setup section, click **Revoke PermSet Assignment**, and follow the on-screen instructions.

3. In Salesforce Classic, from Setup, search for `Chat Buttons and Automated Invitations` in the Quick Find box, and click **Chat Buttons and Automated Invitations**.

4. Select **Chat Button for Einstein FSC Bots**, and click **Edit**.

5. In the Einstein Bots Settings section, clear the `Einstein Bots Configuration` field.

6. Save your changes.

Test-Drive Einstein Bots for Financial Services Cloud

Launch the sample Einstein Bots through Embedded Service to see how chatbots can work for your customers. You can then use the sample data included to test the use cases of a reported lost card and registering an international travel plan.

Get Started

The test data to get started is located in the FSC Einstein Bots Manager.

Report a Lost Card

Use the provided test data to see how you can report a lost card to Einstein Bots for Financial Services Cloud. Block a card even if several cards are available for a customer. If an international travel plan has been registered, choose to have the replacement card delivered to the home address or one of the registered travel destinations.

Register an International Travel Plan

Use the provided test data to see how you can register an international travel plan with Einstein Bots for Financial Services Cloud.

Review Bot Activity

As an administrator, you can track and review all cases created by the bots in your Salesforce org.

Get Started

The test data to get started is located in the FSC Einstein Bots Manager.

Use the information provided in the following table to quickly test-drive the sample Einstein Bots.

Item	Where to Find This Information
Last six digits of the card you want to report as lost or register a travel plan for	1. In your Salesforce org, from the App Launcher (⠿), find and open **FSC Einstein Bots Manager**. 2. On the Financial Accounts tab, use the last six digits of any listed account number.
Email address associated with the card	1. Click the name of the primary owner of the card. The owner's email address is listed on the Details tab. 2. If you want the verification code emailed to you, change the email address to yours.

Report a Lost Card

Use the provided test data to see how you can report a lost card to Einstein Bots for Financial Services Cloud. Block a card even if several cards are available for a customer. If an international travel plan has been registered, choose to have the replacement card delivered to the home address or one of the registered travel destinations.

1. Go to <YOUR_SITE_URL>/FSCBot_Landing.

   <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

2. In the chat window, select **Report Lost Card**.

3. For the card you want to report as lost, enter 875769 as the last six digits.

   In fact, you can use the last six digits of any card in the Financial Accounts tab in your Salesforce org. You accessed this information in Get Started on page 778.

4. Provide the email address associated with this card. You accessed this information in Get Started.

5. Provide the verification code you received by email.

   The verification code is sent to the primary owner's email address.

6. Select the card you want to report as lost, and confirm your choice.

7. If you have a registered plan, confirm the destination address of the card.

The bot creates a case for this lost card and provides you with a case number that you can use to follow up with a human agent later.

Register an International Travel Plan

Use the provided test data to see how you can register an international travel plan with Einstein Bots for Financial Services Cloud.

1. Go to <YOUR_SITE_URL>/FSCBot_Landing.

   <YOUR_SITE_URL> is the site that you created in Set Up Email and Salesforce Sites.

2. In the chat window, select **Register Travel Plan**.

3. For the card against which you want to register a travel plan, provide 875769 as the last six digits

   In fact, you can use the last six digits of any card in the Financial Accounts tab in your Salesforce org. You accessed this information in Get Started on page 778.

4. Provide the email address associated with this card. You accessed this information in Get Started.

5. Provide the verification code you received by email.

   The verification code is sent to the primary owner's email address.

6. Select the card for which you wish to register your travel plan.

7. Provide the name of the country you're traveling to, with trip start and end dates.

The bot creates a case for this travel plan registration and provides you with a case number that you can use to follow up with a human
agent later.

Review Bot Activity

As an administrator, you can track and review all cases created by the bots in your Salesforce org.

1. In your Salesforce org, from the App Launcher (⋮⋮⋮), find and open **FSC Einstein Bots Manager**.

2. On the Cases tab, click **Recently Viewed**, and select **All Cases**.

3. Click the case number you want to review.

4. In the Case Information section, click the Live Chat Transcript record number to open it.

5. On the Details tab, you can review the chat in the Transcript section.

   You can also filter the list to view specific case types. Use the Lost Cards, Travel Plans, and Verification Codes tabs to review each
   case type.

Extend Financial Services Cloud with Other Salesforce Products

Use other Salesforce products with Financial Services Cloud.

Flow Builder for Financial Services Cloud

For Financial Services Cloud, Salesforce provides different sets of pre-assembled flows that are tailored to meet specific business
needs. These sets of flows include mortgage, insurance, and retail banking flows. With Financial Services Cloud, you get the mortgage
flows, by default. However, to get the insurance and retail banking flows, you must install the Lightning Flow for Financial Services
Cloud package. The flows are installed as standard flow templates. You can clone the templates to customize them according to
your business processes.

Guidelines for Salesforce for Outlook

If your firm uses Salesforce for Outlook, consider these guidelines when syncing contacts, events, tasks, and email.

Financial Services Cloud in the Salesforce Mobile App

Boost user productivity by including Financial Services Cloud features in the Salesforce Mobile App.

Flow Builder for Financial Services Cloud

For Financial Services Cloud, Salesforce provides different sets of pre-assembled flows that are tailored to meet specific business needs.
These sets of flows include mortgage, insurance, and retail banking flows. With Financial Services Cloud, you get the mortgage flows,
by default. However, to get the insurance and retail banking flows, you must install the Lightning Flow for Financial Services Cloud
package. The flows are installed as standard flow templates. You can clone the templates to customize them according to your business
processes.

The Lightning Flow for Financial Services Cloud package includes flows that are specific to retail banking and insurance. The flows help your service reps handle customer service requests better and more efficiently. The flows are installed as standard flow templates. You can also clone the templates to customize them according to your business processes.

Financial Services Cloud includes standard flow templates that are specific to mortgage. These flows focus on collecting mortgage application information from loan officers and borrowers. The mortgage-type flows are standard flow templates; you can use them as-is or customize them according to your mortgage application needs.
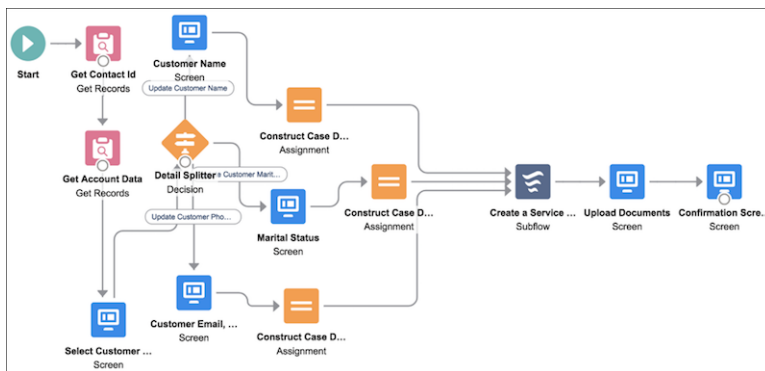
Financial Services Cloud provides screen components that extend the types of input fields available in flow screens.

Flow Builder for Insurance and Retail Banking

The Lightning Flow for Financial Services Cloud package includes flows that are specific to retail banking and insurance. The flows help your service reps handle customer service requests better and more efficiently. The flows are installed as standard flow templates. You can also clone the templates to customize them according to your business processes.

The flows provide step-by-step guidance for common service requests, such as a change of address, nominee, or beneficiary, without the need to navigate to different screens.

Install the Lightning Flow for Financial Services Cloud package from your preferred browser.

Before you can use the flow templates to create flows, create a support process and a case record type. You then link the case record type to the Create Service Request subflow. You can use an existing case record type or support process. However, we recommend that you create a separate support process and case record type dedicated to the flow-related cases.

You can customize the provided flows to meet your needs and add quick actions.

Install Flow Builder for Financial Services Cloud

Install the Lightning Flow for Financial Services Cloud package from your preferred browser.

Before you can install the Lightning Flow for Financial Services Cloud package, Person Accounts must be enabled for your org.

1. Copy and paste the following URL into your browser, and press **Enter**.

   https://industries.secure.force.com/financialservicescloudflow

2. Enter your username and password for the Salesforce org in which you want to install the package, and then click **Log In**.

3. Select **Install for Admins Only**, **Install for All Users**, or **Install for Specific Profiles**, and then click **Install**.

   📝 Note: If the package isn't installed, see Why did my installation or upgrade fail?

You can now complete the configuration steps to make the flows ready for use.

SEE ALSO:

   Enable Person Accounts

   Enable and Configure Person Accounts in Financial Services Cloud

Configure Flow Builder for Financial Services Cloud

Before you can use the flow templates to create flows, create a support process and a case record type. You then link the case record type to the Create Service Request subflow. You can use an existing case record type or support process. However, we recommend that you create a separate support process and case record type dedicated to the flow-related cases.

Create a Support Process

Create a support process for the types of cases that the flows create.

Create a Case Record Type

Create a case record type for the cases that the flows create.

Customize the Create Service Request Subflow

The Create Service Request subflow is installed as a standard flow template. Clone the template and link it to your case record type.

Create a Support Process

Create a support process for the types of cases that the flows create.

1. From Setup, in the Quick Find box, enter `Support Processes`, and then select **Support Processes**.

2. Click **New**.

3. In the Existing Support Process list, select **Master**.

4. For Support Process Name, enter a descriptive name. For example, enter `Service Request`.

5. Optionally, enter a description for the support process. For example, enter `Process for logging customer service cases through flows.`

6. Click **Save**.

7. Leave the Case Status as is, and click **Save**.

Now create a case record type.

Create a Case Record Type

Create a case record type for the cases that the flows create.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Case`, and then select **Case**.

3. Click **Record Types**, and then click **New**.

4. In the Existing Record Type list, to copy all available picklist values, select **Master**. Or, select a specific record type to clone only its picklist values.

5. Enter a record type label that's unique within the object. For example, enter `Flow Service Request`.

6. In the Support Process list, select the support process that you created for the flows.

7. Optionally, enter a description for the record type. For example, enter `Record type for cases created by flows`.

8. To activate the record type, select **Active**.

9. Complete the remaining steps according to your requirements.

10. Save your changes, and then edit the values of the standard and custom picklists available for the record type.

11. In your browser, copy the ID of the record type. You need this ID for configuring the Create Service Request subflow.

Now link the case record type to the Create Service Request subflow.

Customize the Create Service Request Subflow

The Create Service Request subflow is installed as a standard flow template. Clone the template and link it to your case record type.

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

2. In the list of flows, next to Subflow: Create Service Request, click **Open**.

3. Click **Save As**, and select **A New Flow**.

4. Enter a label for the flow, and click **Save**.

5. In the left pane, click the **Manager** tab.

6. Under Variables, click **CaseRecordTypeId**.

7. In the Edit Variable window's Default Value field, paste the case record type ID that you copied from the browser.

8. Click **Done**.

Create and Manage Flows

You can customize the provided flows to meet your needs and add quick actions.

Provided Flows

Several flows for common service requests in retail banking and insurance are included with the Lightning Flow for Financial Services Cloud package.

Customize a Prepackaged Flow

The flows in the package are installed as standard flow templates. You can clone a template and customize it to suit your business processes.

Create a Quick Action for a Flow

Give users easy access to a flow by creating a quick action. When you add the quick action to the Person Account page layout, users can launch the flow from person account record pages.

Add Quick Actions to the Person Account Page Layout

Add the quick actions to the Person Account page layout so that they appear in the action menu on the highlights panel on Person Account record pages.

View a Flow's Output

A flow's output is a case record and a JSON string. The JSON string contains the key pieces of information that are provided during the execution of the flow. If you have an integrated back-end system, you can use the JSON string to record the collected information into your back-end system. To view a flow's JSON output in Lightning Experience, create a report.

Restrict File Types to Upload in a Flow

Files uploaded during a flow are attached to the case record that the flow creates. By default, all file types can be uploaded. You can choose which file types you want to allow.

Set an Approval Limit for Disputed Transactions

For disputed transactions, you can set an approval limit for service reps. If a disputed transaction amount is within the approval limit, the Dispute Transactions flow marks the resulting case as Closed. Otherwise, the case status is marked as New.

Add Documents to the Send Documents Flow

The Send Documents flow has a list of a few commonly used documents. You can add more documents to the list.

Considerations for Working with Flows

Review these points to understand how the provided flows work.

Provided Flows

Several flows for common service requests in retail banking and insurance are included with the Lightning Flow for Financial Services Cloud package.

Table 30: Flows for Retail Banking

Flow	Purpose
Activate Card	Activate a new debit or credit card linked with a financial account.
Close Account	Close a financial account.
Dispute Transactions	Dispute one or more transactions for a financial account.
Issue New Card	Issue a new card for a financial account and send it to the customer's billing or shipping address.
Order Checks	Send checks for a financial account to the customer's billing or shipping address.

Flow	Purpose
Send Documents	Send various financial documents for an account to the customer's billing or shipping address.
Send Statement	Email an account statement or send it to the customer's billing or shipping address.
Update Address	Change the address associated with a financial account.
Update Billing Date and Frequency	Change the billing date and frequency for a financial account.
Update Card Limits	Update the daily withdrawal or credit limit for a card associated with a financial account.
Update Communication Preferences	Update a customer's communication preferences. The preferences include email, phone, marketing, and fax.
Waive Fees	Waive the fees levied on a financial account.

Table 31: Flows for Insurance

Flow	Purpose
Add Beneficiary to Policy	Add a beneficiary to a life or home insurance policy.
Add Driver to Auto Policy	Add a driver to an auto insurance policy.
Cancel Policy	Cancel an insurance policy.
Initiate FNOL	Initiate the first notification of loss for an insurance policy.
Initiate Loan Against Policy	Initiate a loan against a policy at the customer's request.
Send Documents	Send policy-related documents for an insurance policy to the customer's billing or shipping address.
Update Communication Preferences	Update a policyholder's communication preferences. The preferences include email, phone, marketing, and fax.
Update Customer Details	Update policyholder information, such as name, email address, and phone number.
Update Lienholder	Change the lienholder on a home or auto insurance policy.
Update Policy Beneficiary Details	Update a policy beneficiary's information, such as name, email address, phone number, and share percentage.
Update Premium Payment Date and Frequency	Change the premium payment date and frequency for an insurance policy.
Update Premium Payment Method	Change the current method or add a method for paying the premium of an insurance policy.

Customize a Prepackaged Flow

The flows in the package are installed as standard flow templates. You can clone a template and customize it to suit your business processes.

Before you begin, customize the Create Service Request subflow and link it to the case record type.

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

2. Click **New Flow**.

3. In the list of templates, select the template that you want to clone, and click **Create**.

4. Replace the original Create Service Request subflow with the customized subflow that you linked to the case record type.

   a. On the Elements tab, drag the Subflow element on the canvas.

   b. In the search box, enter the name of the new subflow, and then select it.

   c. Enter the required details, and set the input values as they are in the original Create Service Request subflow.

   d. Click **Done**.

   e. Delete the original Create Service Request subflow. Then connect your new subflow to the source and target elements that the original Create Service Request subflow was connected to.

5. Customize the flow according to your business requirements, and then save your changes.

6. Activate the flow.

   a. In the list of flows, click the name of the new flow.

   b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

Now create a quick action for the flow.

Create a Quick Action for a Flow

Give users easy access to a flow by creating a quick action. When you add the quick action to the Person Account page layout, users can launch the flow from person account record pages.

1. From Setup, open **Object Manager**.

2. Click **Account**.

3. Click **Buttons, Links, and Actions**, and then click **New Action**.

4. In the Action Type list, select **Flow**.

5. In the Flow list, select the flow that you want to create the quick action for.

6. Leave the Standard Label Type field as is.

7. Enter a label for the action. Users see this label as the name of the action.

8. Save your changes.

Now add the quick action to the Person Account Page layout.

Add Quick Actions to the Person Account Page Layout

Add the quick actions to the Person Account page layout so that they appear in the action menu on the highlights panel on Person Account record pages.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Person Account`, and then select **Person Account**.

3. Click **Page Layouts**, and then click **Person Account Layout**.

4. On the palette, select **Mobile & Lightning Actions**.

5. Drag the quick actions to the Salesforce Mobile and Lightning Experience Actions section.

6. Save your changes.

View a Flow's Output

A flow's output is a case record and a JSON string. The JSON string contains the key pieces of information that are provided during the execution of the flow. If you have an integrated back-end system, you can use the JSON string to record the collected information into your back-end system. To view a flow's JSON output in Lightning Experience, create a report.

1. Create a custom report type.

   a. From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**.

   b. Click **New Custom Report Type**.

   c. In the Primary Object list, select **Case Gateway Requests**.

   d. Enter a label for the report type. The label can be up to 50 characters long.

   e. Enter a description for the report type. The description can be up to 255 characters long.

   f. Select the category in which you want to store the custom report type.

   g. Click **Next**, and then click **Save**.

2. Create a report.

   a. In your org, on the Reports tab, click **New Report**.

   b. In the list of report types, select your report type, and then click **Next**.

   c. Add the Integration Payload field to the report.

   d. Click **Save & Run**.

Restrict File Types to Upload in a Flow

Files uploaded during a flow are attached to the case record that the flow creates. By default, all file types can be uploaded. You can choose which file types you want to allow.

1. Open the flow, and double-click the screen element that contains the File Upload component.

2. In the Edit Screen window, select the **File Upload** component.

3. In the right pane, in the Accepted Formats field, enter a comma-separated list of the file extensions that users can upload.

4. Click **Done**, and then save your changes.

Set an Approval Limit for Disputed Transactions

For disputed transactions, you can set an approval limit for service reps. If a disputed transaction amount is within the approval limit, the Dispute Transactions flow marks the resulting case as Closed. Otherwise, the case status is marked as New.

1. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then select **Custom Metadata Types**.

2. In the list of custom metadata types, next to Transaction Dispute Approval Limit, click **Manage Records**.

3. Click **New**.

4. Enter a label for the approval limit.

5. In the Agent Approval Limit field, enter the approval limit amount.

6. Save your changes.

Add Documents to the Send Documents Flow

The Send Documents flow has a list of a few commonly used documents. You can add more documents to the list.

1. Open the Send Documents flow, and then double-click the **Correspondence Selection** screen element.

2. In the Edit Screen window, select the **Documents** list.

3. In the right pane, under Select Choices, click **Add Choice** to add a document to the Documents list.

4. Click **Done**, and then save your changes.

Considerations for Working with Flows

Review these points to understand how the provided flows work.

- Most of the provided flows don't add or update any records in your org. However, some flows add or update the corresponding record during execution because the subsequent steps in the flow need the new or updated record to proceed. For example, the Add Beneficiary to Policy flow adds the new beneficiary so that the beneficiary's share percentage can be specified in the subsequent step. These flows add or update records.

- - Add Beneficiary to Policy
  - Add Driver to Auto Policy
  - Dispute Transactions
  - Initiate FNOL
  - Update Billing Date and Frequency
  - Update Communication Preferences
  - Update Lienholder
  - Update Policy Beneficiary Details
  - Update Premium Payment Method
  - Waive Fees

- The Dispute Transactions flow creates a case and a case gateway request for each transaction selected during the flow. Having a separate case for each disputed transaction makes it easier to track each case against its own service-level agreement (SLA).

- To use a flow, a user must have access to the underlying object and its fields. For example, for the Update Communication Preferences flow, the user must have access to the Do Not Call, Email Opt Out, Fax Opt Out, and Marketing Opt-Out fields on the Contact object.

Flow Builder for Mortgage

Financial Services Cloud includes standard flow templates that are specific to mortgage. These flows focus on collecting mortgage application information from loan officers and borrowers. The mortgage-type flows are standard flow templates; you can use them as-is or customize them according to your mortgage application needs.

Provided Flows

The mortgage standard flow templates are based on the U.S. Uniform Residential Loan Application released in February 2019. The flows walk loan officers and borrowers through the application process for a residential loan application record in three flows. Other flows provide a loan summary view and allow borrowers to launch a mortgage flow for generic help (create a case).

Customize Standard Flow Templates

The mortgage flows in Financial Services Cloud are installed as standard flow templates. You can customize any of the flows to suit your business needs.

Provided Flows

The mortgage standard flow templates are based on the U.S. Uniform Residential Loan Application released in February 2019. The flows walk loan officers and borrowers through the application process for a residential loan application record in three flows. Other flows provide a loan summary view and allow borrowers to launch a mortgage flow for generic help (create a case).

To run a mortgage flow, you must already have a residential loan application record.

Flow	Purpose
Assets and Liabilities Assets and Liabilities Subflow	Collects borrower financial details like account assets, real estate assets, other assets, liabilities, and monthly expenses.
Borrower Information Borrower Information Subflow	Collects personal borrower details like name, address, military service, employment history, other income, application property details, declarations, and demographics.
Lender Loan Information	Collects general application details like property, title, loan, borrower qualification details, and homeowner education or housing counseling attendance.
Mortgage Flow Launcher	Collects borrower details of a request for help with loans or loan applications. Supports borrower document uploads.
Summary View	Displays summary sections for selected mortgage objects based on the Unified Residential Loan Application (URLA).

Note: To run the Assets and Liabilities flow, the residential loan application must have at least one associated loan applicant record.

Customize Standard Flow Templates

The mortgage flows in Financial Services Cloud are installed as standard flow templates. You can customize any of the flows to suit your business needs.

The Borrower Information and Assets and Liabilities mortgage flows rely on the Borrower Information Subflow and the Assets and Liabilities Subflow respectively. If you want to create a custom version of any flow that relies on a subflow:

1. Create the custom subflow.

2. Create the custom main flow

3. Update the references to the custom subflow in the custom main flow.

> ✏️ **Note:** Mortgage flows can't be paused, so you can't add Wait elements when customizing mortgage flows.

To customize a flow, create a flow based on the standard template flow.

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

2. Click **New Flow**.

3. In the list of templates, select the template that you want to customize, and click **Create**.

4. Customize the flow according to your business requirements, and then save your changes.

5. Activate the flow.

   a. In the list of flows, click the name of the new flow.

   b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

Make sure that your Actions and Recommendations deployment exposes your customized mortgage flows instead of the standard flow templates. Also, specify your customized mortgage flows in the flow elements or flow-type quick actions that you use to expose your mortgage flows to borrowers in Communities.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Financial Services Cloud provides screen components that extend the types of input fields available in flow screens.

> ✏️ **Note:** To use Financial Services Cloud flow screen components, the objects used with the components must support multiple currencies.

Flow Screen Input Component: Button Picklist from Collection
Display labels from a collection variable in a list of buttons.

Flow Screen Input Component: Button Picklist from Field
Display labels from a collection variable in a list of buttons.

Flow Screen Input Component: Checkbox Group from Collection
Populate a checkbox group with values from a text collection variable, and let user choose multiple options.

Flow Screen Input Component: Footer with Customizable Buttons

Display a custom button in the flow screen footer, customize text for the Next button, and controls display of the Previous button.

Flow Screen Input Component: Multi-Select Table

Display a table with a checkbox next to each row in the table. A user can select one or more rows in the table.

Flow Screen Input Component: Screen Button

Add a custom button to the body of your screen.

Flow Screen Input Component: Single-Select Table

Display a table with a radio button next to each row in the table. A user can select one of the rows in the table.

Flow Screen Input Component: Section Summary View

Displays selected mortgage objects based on the Unified Residential Loan Application (URLA). All objects in the collections variable for the Section Summary component must be API names of Mortgage objects.

Flow Screen Input Component: Button Picklist from Account ID

Displays relevant information about all residential loan application and financial account records associated with the account ID of the logged in user in a button picklist. If the flow user selects a financial account, the control sets the case record to the associated financial account ID.

SEE ALSO:

Provided Flow Screen Components

Flow Screen Input Component: Button Picklist from Collection

Display labels from a collection variable in a list of buttons.

For information about adding screen components to your flow screen, see Screen.

> **Note:** This screen component requires Lightning runtime.

Configure the Button Picklist from Collection Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Choice Labels	Add a text collection variable containing choice labels to this component. You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.

Attribute	Description
`Label`	User-friendly text that displays above the component.
`Required`	Requires users to select a value before they can move to the next screen.
`Selected Value`	A variable containing default choice value.

Store the Button Picklist from Collection Component in the Flow

All attributes are available to store in flow variables, but the Selected Value attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Selected Values attribute to a variable.

💡 **Tip:** By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Button Picklist from Field

Display labels from a collection variable in a list of buttons.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Button Picklist from Field Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Label	User-friendly text that displays above the component. This attribute accepts single-value resources. The value is treated as text.
Object API Name	The API name of the object that the picklist field belongs to.
Picklist API Name	The API name of the picklist field.
Required	Requires users to select a value before they can move to the next screen.
Selected Value	The default value for the component.

Store the Button Picklist from Field Component in the Flow

All attributes are available to store in flow variables, but the Selected Value attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Selected Value attribute to a variable.

💡 **Tip:** By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Checkbox Group from Collection

Populate a checkbox group with values from a text collection variable, and let user choose multiple options.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Checkbox Group from Collection Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Choice Labels	Add a text collection variable containing choice labels to this component. You can't reorder choices or select the same choice twice.
Choice Values	A collection variable containing API values that correspond to the choice labels for this component.
Group Label	User-friendly text that displays above the component.
Selected Values	A collection variable containing default choice values.

Usage

All attributes are available to store in flow variables, but the Selected Values attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Selected Values attribute to a collection variable.

💡 **Tip:** By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Footer with Customizable Buttons

Display a custom button in the flow screen footer, customize text for the Next button, and controls display of the Previous button.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Footer with Custom Buttons Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Custom Button Label	The label for the custom button. This attribute accepts single-value resources. The value is treated as text.
Custom Button Value	Whether the button was clicked. This attribute accepts single-value Boolean resources.
Next Button Label	The label for the Next button. This attribute accepts single-value resources. The value is treated as text.
Show Previous Button	Whether the Previous button is displayed. This attribute accepts single-value Boolean resources.

Store the Footer with Custom Buttons Component in the Flow

All attributes are available to store in flow variables, but Custom Button Value is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Custom Button Value attribute to a Boolean flow variable or a Boolean field on a record variable.

💡 Tip: By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Multi-Select Table

Display a table with a checkbox next to each row in the table. A user can select one or more rows in the table.

Select the transactions to dispute.

	Transaction Name	Amount	Transaction Date
☐	T-000000005	$16.00	Jun 14, 2019
☐	T-000000000	$12.00	Jun 10, 2019
☐	T-000000001	$23.00	Jun 12, 2019
☐	T-000000002	$23.00	Jun 11, 2019
☐	T-000000003	$65.00	Jul 8, 2019

For information about adding screen components to your flow screen, see Screen.

Note: This screen component requires Lightning runtime.

Configure the Multi-Select Table Component

You can select resources from the flow, such as variables or global constants, or you can manually enter a value.

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Columns	Required. Defines columns for the table.
	Add a Text collection variable that contains a list of field API names that you want to include in the table.
Records	Required. Defines rows for the table.
	Add a Text collection variable that contains a list of record IDs that you want to include in the table.
	Ensure that the variable contains at least one record ID. Otherwise, the component shows an error message when you run the flow.
Editable Column	Enter the API name of the column that you want to be editable in the table.
	You can have only one editable column, and it must be one of the columns that you entered in the Columns field.
Error Messages	Add a Text variable to store error messages returned by the component.

Attribute	Description
Selectable Rows	If it's set to $GlobalConstant.True, the rows in the table are selectable. By default, it's set to $GlobalConstant.False.
Selected Records	Add a Text collection variable to store the selected records.
	To access individual record IDs, create a loop that iterates over this collection variable.

Store the Multi-Select Table Component's Values in the Flow

The flow stores values automatically. If you store values manually, store the attribute's output value in a variable.

To store values manually, select **Manually assign variables (advanced)**.

All attributes are available to store in flow variables, but the Selected Records attribute is the most likely attribute to store.

To store the records that the user selected, map the Selected Records attribute to a text collection variable.

💡 Tip: By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

👁 Example: In a Dispute Transactions flow, a table shows all the transactions for the selected financial account. Users can select one or more transactions that they want to dispute.

1. Define the columns for the table.

    a. Create a Text collection variable.

    b. Use an Assignment element to assign the API names of the fields to the Text collection variable. The fields must be from the same object. Add the fields in the order in which you want them to appear in the table.

    c. Connect the Assignment element at the appropriate place in the flow.

2. Define the rows for the table.

a. Create a Record collection variable.

b. Use a Get Records element to populate the Record collection variable with the records that you want to include in the table.

c. Create a Text collection variable.

d. Create a loop that iterates over the Record collection variable to fetch individual record IDs. Within the loop, use an Assignment element to add the fetched record IDs to the Text collection variable.

e. At the end of the loop, use the Text collection variable as an input to the table.

When a user runs the flow, the table shows all the transactions for the financial account that the user selects.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Screen Button

Add a custom button to the body of your screen.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Screen Button Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Button Value	Whether the button was clicked.
	This attribute accepts single-value Boolean resources.
Label	The label for the button.
	This attribute accepts single-value resources. The value is treated as text.

Store the Screen Button Component's Values in the Flow

All attributes are available to store in flow variables, but Button Value is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Button Value attribute to a Boolean flow variable or a Boolean field on a record variable.

💡 Tip: By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

SEE ALSO:

Flow Screen Components Provided in Financial Services Cloud

Provided Flow Screen Components

Flow Screen Input Component: Single-Select Table

Display a table with a radio button next to each row in the table. A user can select one of the rows in the table.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Single-Select Table Component

You can select resources from the flow, such as variables or global constants, or you can manually enter a value.

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Columns	Required. Defines columns for the table.
	Add a Text collection variable that contains a list of field API names that you want to include in the table.
Records	Required. Defines rows for the table.
	Add a Text collection variable that contains a list of record IDs that you want to include in the table.
	Ensure that the variable contains at least one record ID. Otherwise, the component shows an error message when you run the flow.
Error Messages	Add a Text variable to store error messages returned by the component.
Selected Record	Add a Text variable to store the selected record.

Store the Single-Select Table Component's Values in the Flow

The flow stores values automatically. If you store values manually, store the attribute's output value in a variable.

To store values manually, select **Manually assign variables (advanced)**.

All attributes are available to store in flow variables, but the Selected Record attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the record that the user selected, map the Selected Record attribute to a text variable.

💡 **Tip:** By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.

- Navigates to another screen and returns to the component's screen.
- Pauses the flow then resumes it.
- Navigates to the next screen and triggers an input validation error.

Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

👁 Example: In a Waive Fees flow, a table shows all the transactions for the selected financial account. Users can select only one transaction to waive.

1. Define the columns for the table.

    a. Create a Text collection variable.

    b. Use an Assignment element to assign the API names of the fields to the Text collection variable. The fields must be from the same object. Add the fields in the order in which you want them to appear in the table.

    c. Connect the Assignment element at the appropriate place in the flow.

2. Define the rows for the table.

    a. Create a Record collection variable.

    b. Use a Get Records element to populate the Record collection variable with the records that you want to include in the table.

    c. Create a Text collection variable.

    d. Create a loop that iterates over the Record collection variable to fetch individual record IDs. Within the loop, use an Assignment element to add the fetched record IDs to the Text collection variable.

    e. At the end of the loop, use the Text collection variable as an input to the table.

    When a user runs the flow, the table shows all the transactions for the financial account that the user selects.

Flow Screen Input Component: Section Summary View

Displays selected mortgage objects based on the Unified Residential Loan Application (URLA). All objects in the collections variable for the Section Summary component must be API names of Mortgage objects.

Establish the access mode (read only, view/edit) for section records.

Select which sections to display and the order in which they're presented in the Section Summary panel.

For information about adding screen components to your flow screen, see Screen.

📝 **Note:** This screen component requires Lightning runtime.

Configure the Section Summary View Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Choice Labels	Add a text collection variable containing choice labels to this component. You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.
Label	User-friendly text that displays above the component.
Required	Requires users to select a value before they can move to the next screen.
Selected Value	A variable containing default choice value.

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Store the Section Summary View Component in the Flow

All attributes are available to store in flow variables, but the Selected Value attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Selected Values attribute to a variable. This collection variable contains the API names of the summary sections to display to the flow user at run time.

> 💡 **Tip:** By default, screen components that run on Lightning runtime version 58 and prior have no memory. If a user enters a value, and then does one of the following, the value is lost.
>
> - Navigates to another screen and returns to the component's screen.
> - Pauses the flow then resumes it.
> - Navigates to the next screen and triggers an input validation error.
>
> Setting the attribute enables a flow to remember the value. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

Flow Screen Input Component: Button Picklist from Account ID

Displays relevant information about all residential loan application and financial account records associated with the account ID of the logged in user in a button picklist. If the flow user selects a financial account, the control sets the case record to the associated financial account ID.

For information about adding screen components to your flow screen, see Flow Element: Screen.

> 📝 **Note:** This screen component requires Lightning runtime.

Configure the Button Picklist from Account ID Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Choice Labels	Add a text collection variable containing choice labels to this component. 📝 **Note:** You can't reorder choices or select the same choice twice.
Choice Values	Add a collection variable containing API values that correspond to the choice labels for this component.
Help Text	Give your users more context for this screen component. The text you enter is available in an info bubble next to the component.
Label	User-friendly text that displays above the component.

Attribute	Description
Required	Requires users to select a value before they can move to the next screen.
Selected Value	A variable containing default choice value.

Store the Button Picklist from Account ID Component in the Flow

All attributes are available to store in flow variables, but the Selected Value attribute is the most likely attribute to store. The value is assigned when the user navigates to the next screen.

To store the user's action, map the Selected Values attribute to a variable.

> **Tip:** By default, screen components that require Lightning runtime have no memory. If a user enters a value, navigates to another screen, and returns to the component's screen, the user-entered value is lost. To enable a flow to remember the value of an attribute, set the attribute. The flow stores the value automatically. If you store values manually, store the attribute's output value in a variable.

Guidelines for Salesforce for Outlook

If your firm uses Salesforce for Outlook, consider these guidelines when syncing contacts, events, tasks, and email.

- Your users can create and sync contacts, events, and tasks in both directions.
- An individual's record created in Salesforce sync with Outlook in both directions.

  > **Note:** Creating an individual's record in Outlook isn't currently supported.

- Using the Salesforce for Outlook side panel, your users can add emails, events, and tasks to individuals. When emailing an individual, users can add the email to the individual's record. When sending or receiving email about an individual, users can associate the email with one or more of the individuals involved. Associating individuals with Outlook calendar events and Outlook tasks works similarly.
- Added emails, events, and tasks are displayed in the Activity tab of the individual's profile.
- Emails, tasks, and events are associated with the contact part of the individual's record.

  > **Tip:** Sometimes, the side panel displays an individual's name twice. The Add icon appears next to both, with no indication that one is the account record while the other is the contact record. Instruct your users to select the name on top, to properly associate the item with the contact part of the individual.

Financial Services Cloud in the Salesforce Mobile App

Boost user productivity by including Financial Services Cloud features in the Salesforce Mobile App.

Let mobile users access Financial Services Cloud features by setting up a home page, customizing actions and navigation menus, and adding Financial Service Cloud components to the Salesforce Mobile App.

Set Up a Mobile Home Page

Boost users' productivity on the go by setting up a Financial Services Cloud home page for the Salesforce mobile app.

Modify the Mobile Navigation Menu

Let users access Financial Services Cloud through the mobile navigation menu.

Add Actions to Custom Object Page Layouts

Enable clone, delete, and edit actions for Financial Services Cloud custom objects so that users can access them on record detail pages in Lightning Experience.

Mobile-Enabled Financial Services Cloud Components

Give Salesforce Mobile users access to the Financial Services Cloud components that they need to stay productive away from their desks.

Add Financial Services Cloud Components to Salesforce Mobile

Help users be more productive by adding Financial Services Cloud Lightning Components to the Salesforce mobile app.

Set Up a Mobile Home Page

Boost users' productivity on the go by setting up a Financial Services Cloud home page for the Salesforce mobile app.

📝 **Note:** Salesforce is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers.

1. From Setup, enter `Lightning App Builder` in the Quick Find box, and then select **Lightning App Builder**.

2. Click **New**.

3. Select **App Page** and click **Next**.

4. Enter a label, such as `Mobile Home`.

5. Select a layout for your page, then click **Done**.

6. Drag components onto the canvas to customize your mobile home page. Choose from standard and custom Financial Services Cloud components.

7. To preview the mobile home page, click **Desktop** and then select **Phone**.

8. Save the page.

9. Click **Activate**.

10. On the MOBILE NAVIGATION tab, click **Add page to app** to add your home page to the mobile navigation menu.

11. Save your changes.

📝 **Note:** To activate mobile home pages as part of your mobile navigation, see Modify the Mobile Navigation Menu .

Modify the Mobile Navigation Menu

Let users access Financial Services Cloud through the mobile navigation menu.

📝 **Note:** Leverage person accounts to make the most of Financial Services Cloud on a mobile browser.

1. From Setup, enter `Mobile` in the Quick Find box, then select **New Salesforce Mobile App QuickStart**.

2. Click **Launch Quick Start Wizard**.

3. Click **Let's Get Started**.

4. Drag items from Available Items to the Navigation Menu.

   We recommend the sequence: Mobile Home, Today, Chatter, Tasks, Events, Dashboards, Reports, People, Groups, and Smart Search Items.

> 📝 **Note:** See Set Up a Mobile Home Page to configure your mobile home page.

> 📝 **Note:** In Smart Search Items, users see recently viewed Salesforce objects. We recommend the sequence: Accounts, Contacts, Financial Accounts, Financial Goals, Financial Holdings, Assets and Liabilities, Leads, and Opportunities.

5. Click **Save & Next**.

6. Click **Arrange Global Actions**.

7. From the Layout dropdown, select **Advisor Publisher Layout**.

> 📝 **Note:** If you don't see the **Advisor Publisher Layout** in the dropdown, configure your own publisher layout. For details, see Add Global Actions to Publisher Layouts.

8. Click **Save & Next**.

9. Click **Create Compact Layout**.

10. In the Compact Layout for Contacts, add the following fields: Name, Account Name, Phone, and Email.

11. Click **Save & Next**.

12. Review your configuration and click **Next**.

13. (Optional) Send invitations.

14. Click **Next** and **Finish**.

SEE ALSO:

What's Different or Not Available in the Salesforce Mobile App

What's Different or Not Available in the Salesforce Mobile App

Add Actions to Custom Object Page Layouts

Enable clone, delete, and edit actions for Financial Services Cloud custom objects so that users can access them on record detail pages in Lightning Experience.

1. From the management settings for each custom object whose actions you want to manage, such as Financial Accounts, go to **Page Layouts**.

2. Select **Edit** next to each page layout you want to add actions to.

3. Select the **Mobile & Lightning Actions** category in the palette, and then drag these actions to the Salesforce Mobile and Lightning Experience Actions section.

   - **Clone**
   - **Delete**
   - **Edit**

4. Save your changes.

5. Repeat these steps for each custom object's page layout, as needed.

Mobile-Enabled Financial Services Cloud Components

Give Salesforce Mobile users access to the Financial Services Cloud components that they need to stay productive away from their desks.

The following Financial Services Cloud components can be added to and used within the Salesforce Mobile app.

Table 32: Mobile-Enabled Components

Component	Description
Action Plan	View action plans and task items.
Assets and Liabilities	View, edit, and create Assets and Liabilities records for all kinds of accounts.
Bank Account	View, edit, and create Bank Account records for all kinds of accounts.
Client Record Detail	View Client Record Detail for all kinds of accounts.
Financial Account Alert	Display an alert message on a financial account page.

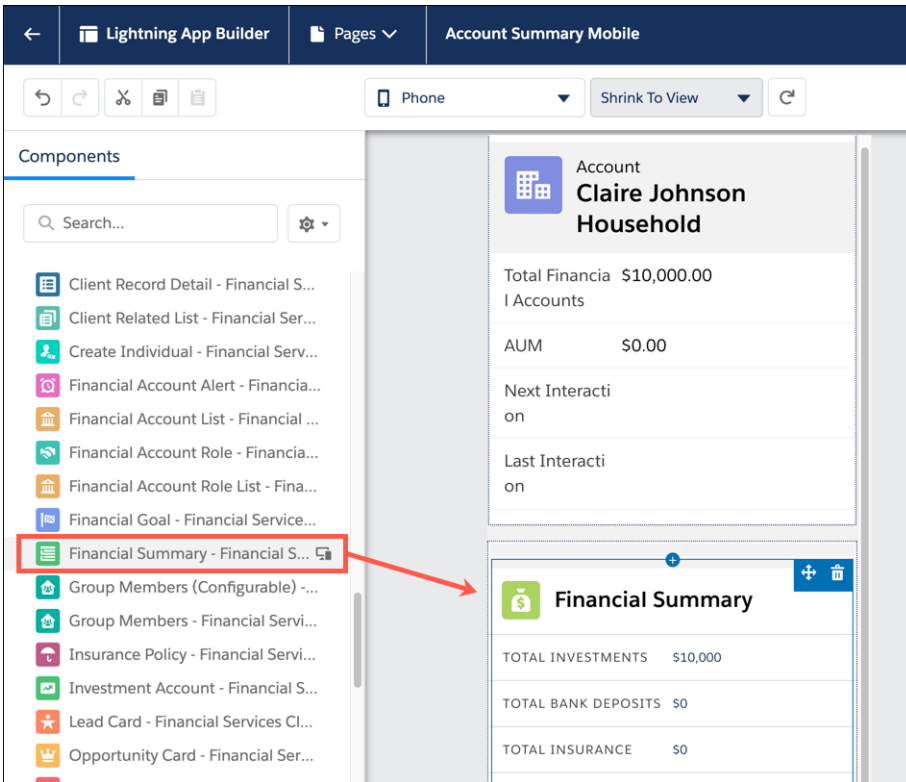| Component	Description
Financial Account List	Show a related list of financial accounts on an account page.
Financial Account Role	View, edit, and create Financial Account Roles for all kinds of accounts.
Financial Account Role List	Show a related list of financial account roles on an account page.
Financial Goal	View Financial Goals for Household and Person accounts. Edit and create Financial Goals for Household accounts only.
Financial Summary	View Financial Summary information for all kinds of accounts.
Group Members	Show a related list of group members and rollup totals on a group-enabled account page.
Group Members (Configurable)	Show a related list of group members and rollup totals on a group-enabled account page. Can be configured to show fields for those members based on a given field set.
Insurance Policy	View, edit, and create Insurance Policy records for all kinds of accounts.
Interaction Summaries	View, edit, create, or search interaction summaries.
Investment Account	View, edit, and create Investment Accounts for all kinds of accounts.
Related Accounts	View Related Accounts for all kinds of accounts. Edit and create Related Accounts for Households and Business Accounts only.
Related Contacts	View Related Contacts for Households and Business Accounts only.
Relationship Group List	List the relationship groups that an account, contact, or individual belongs to.

Add Financial Services Cloud Components to Salesforce Mobile

Help users be more productive by adding Financial Services Cloud Lightning Components to the Salesforce mobile app.

First, enable a page in your app for the Phone form factor so that page can appear on mobile devices. Then use Lightning App Builder to add Financial Services Cloud components to the mobile-enabled page.

1. From Setup, enter `Lightning App Builder` in the Quick Find box, and then select **Lightning App Builder**.
2. Click **New**.
3. Select **Record Page** and click **Next**.
4. Enter a Label for the record page, such as `AccountSummaryMobile`.
5. Select an object for the page, such as **Account**, and click **Next**.
6. From the list of page templates, choose one that supports the Phone form factor, such as Grouped Header and One Region, and click **Done**.
7. To add Financial Services Cloud components to your mobile app page, drag them from the left-hand Components list into the empty regions on the page.

   A small icon appears next to a component name to indicate whether the component works with the desktop or phone form factor, or both.

8. For example, drag the **Highlights Panel** component into the empty region that says, "Add Component(s) to Grouped Header Region Here". Then drag the component named **Financial Summary - Financial Services Cloud** into the lower region.

9. After a component has been placed in a page region, click the component to see or change its properties in the right-hand side panel.

10. Click **Save** when you're done editing your page.

After a page is saved, it must be activated before users can see it in the app. For more information about activating and previewing Salesforce mobile apps, see Preview Mobile App Pages in Lightning App Builder.

SEE ALSO:

>   *Salesforce Help*: Create a Mobile App Page with the Lightning App Builder
>
>   *Salesforce Help*: How Page Layouts Work in the Salesforce Mobile App

Work with Data in Financial Services Cloud

Integrating data from custodians, banking systems, financial planning, portfolio management, asset aggregation, and all the other platforms that support your front- to back-office is a major implementation task. If you use Data Loader to bulk import data, we recommend a sequence for exporting and importing the initial objects.

When uploading the data:

-   Maintain consistent naming conventions for the account and contact parts of individual clients.
-   Don't upload financial transaction data that could override fields that are automatically calculated in Financial Services Cloud, doing so will affect other field values and roll-up summaries.

We recommend this sequence for uploading individual, group, and financial account data - Individuals, Identification documents, Employment, Education, Relationship groups, Individuals' relationships to groups, Charges and Fees, Financial accounts, Cards, Financial account transactions, Billing statements, Securities, and Financial Holdings. Continue with the remaining objects in any sequence.

Upload Data for Individuals Using Data Loader

Start by uploading data about individuals using Data Loader. First upload Account data, then, if your org uses the individual model, Contact data. You can then add identification documents, employment, and education details that you hold for individuals.

Before you start, we recommend that you:

- Ensure that you've identified all the picklist values in use for each object so that you load valid values for picklist or multi-select picklist fields.
- Run the latest version of Data Loader, which is always available in Salesforce.

1. In Developer Console, look up the `Id` for the Account object record type.

   When using the individual object model, use the `IndustriesIndividual` Account object record type. When using the person accounts, use `PersonAccount`

   > 📝 Note: If you created custom record types, use your values rather than the ones above. If you are using multiple record types, remember to look up their IDs too and assign users the correct record type ID.

   a. From the Salesforce header, open Developer Console.

   b. Select Query Editor.

   c. Enter this SOQL query: `SELECT DeveloperName, Id, SobjectType FROM RecordType Where SobjectType='Account' AND DeveloperName='<record type ID>'`.

d. **Execute** the query.

e. From the query results, copy the `Id` from the record.

2. In Data Loader, after you've logged in, export the Account object to a CSV file.

    a. Export the data to a new CSV file. Use the file name `account.csv`.

    b. Choose **Select all fields** when creating your SOQL query.

3. In the resulting `account.csv` file, paste the `Id` value that you copied from your earlier query into the `RecordTypeId` field for every record that you upload.

   > 🛑 Important: Every record must have this same `RecordTypeId` value. The `FinServ__IndividualType__c` field also shows the value, Individual, which confirms that the record is for an individual.

4. In the `account.csv` file, enter the rest of your individuals' data to upload data for the account part of each individual. Remember these guidelines.

   - As records are created, the value of `OwnerID` defaults to your user ID. To assign another team member as owner, set the `OwnerID` to the person's user ID.

   - Ensure that dates are formatted to match the date format specified for your org.

   - When entering data for an org using the person account model.

     - Used the FirstName and LastName columns instead of the Name column.

     - To import a custom Contact field, use the column `<Namespace_FieldName>__pc`. For example, to add data for the contact field `<Namespace>__Citizenship__c` add data to the `<Namespace>__Citizenship__pc` column

     - To import data a standard Contact field, use the `Person<FieldName>`. For example, to add a contact's `Birthdate` field use the `PersonBirthdate` column.

5. In the Data Loader, use Insert and identify that you are uploading data to the Account object with the data from your updated `account.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

> 💡 **Tip:** For every Account record that has the individual `RecordTypeId`, Salesforce automatically creates a primary Contact record for each Account record. In a later step, you perform another data upload to update these Contact records.

6. In your org, check for the records for individuals to verify the upload of Account data.

7. When using the individual object model, import the contact records corresponding to the imported account records.

    a. In Data Loader, export the Contact object to a CSV file.

    b. Export the data to a new CSV file. Use the file name `client_contact.csv`.

    c. Choose **Select all fields** when creating your SOQL query. Specify the condition that the `FinServ__IndividualType__c field = Individual`.

    d. In the `client_contact.csv` file, enter the data for the contact part of each individual, such as mailing address and email.

> 🚫 **Important:** Do not edit these fields as they uniquely identify each Contact record and its relationship with the Account record for the individual.
>
> - `RecordTypeId`
> - `Id`
> - `FinServ__IndividualId__c`
> - `FinServ__IndividualType__c`
> - `AccountId`

    e. In Data Loader, use Update and identify that you are updating the Contact object with the data from your updated `client_contact.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

    f. In your org, check for the updated individual records to verify your upload of Contact data.

8. If you have identification documents to upload:

    a. In Data Loader, export the Identification Document object to a CSV file.
        We recommend that you:

       - Export the data to a new CSV file.
       - Use the file name `id_docs.csv`.
       - Choose **Select all fields** when creating your SOQL query.

    b. In the resulting `id_docs.csv` file, delete these columns:

       - Id
       - IsDeleted
       - CreatedDate
       - CreatedById
       - LastModifiedDate
       - LastModifiedById
       - SystemModStamp
       - LastActivityDate
       - LastViewedDate
       - LastReferencedDate

    c. In the `id_docs.csv` file, enter your data for identification documents.

> 📝 **Note:** If you haven't done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the AccountId for each record and add it to `FinServ__Account__c`.

d. In Data Loader, use Insert and identify that you are updating the Identification Documents object with the data from your updated `id_docs.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

e. In your org, check for the identify document for individuals to verify the load.

9. If you have employment data to upload:

a. In the Data Loader, export the Employment object to a CSV file.
We recommend that you:

- Export the data to a new CSV file.
- Use the file name `employment.csv`.
- Choose **Select all fields** when creating your SOQL query.

b. In the resulting employment.csv file, delete these columns:

- Id
- IsDeleted
- CreatedDate
- CreatedById
- LastModifiedDate
- LastModifiedById
- SystemModStamp
- LastActivityDate
- LastViewedDate
- LastReferencedDate
- `FinServ__LengthOfEmployment__c`

c. In the `employment.csv` file, enter your data for employment records.

> 📝 **Note:** If you haven't done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the Contact ID for each record and add it to `FinServ__Contact__c`

d. In Data Loader, use **Insert** and identify that you are updating the Employment object with the data from your updated `employment.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

e. In your org, check for the employment records for individuals to verify the load.

10. If you have education data to upload:

a. In Data Loader, export the Education object to a CSV file.
We recommend that you:

- Export the data to a new CSV file.
- Use the file name `education.csv`.
- Choose **Select** all fields when creating your SOQL query.

b. In the resulting `employment.csv` file, delete these columns:

- Id

- IsDeleted
- CreatedDate
- CreatedById
- LastModifiedDate
- LastModifiedById
- SystemModStamp
- LastActivityDate
- LastViewedDate
- LastReferencedDate

   c. In the **education.csv** file, enter your data for education records.

> 📝 Note: If you haven't done so already, in Data Loader, export the Contact object to a CSV file. In the downloaded CSV file, look up the Contact ID for each record and add it to `FinServ__Contact__c`.

   d. In Data Loader, use **Insert** and identify that you are updating the Education object with the data from your updated `education.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

   e. In your org, check for the education records for individuals to verify the load.

Upload Household Data Using Data Loader

Upload data about households using Data Loader.

1. In the Developer Console, look up the `Id` for the `IndustriesHousehold` record type for the Account object.

   a. From the Salesforce header, open Developer Console.

   b. Select Query Editor.

   c. Enter this SOQL query: `SELECT DeveloperName, Id, SobjectType FROM RecordType Where SobjectType='Account' AND DeveloperName='IndustriesHousehold'`.

> 💡 Tip: As you queried for the `Id` in an earlier step when you uploaded individual data, check the History pane. If your previous query is listed, reuse it.

   d. **Execute** the query.

   e. From the query results, copy the `Id` from the record.

2. In Data Loader, export the Account object to a CSV file.

We recommend that you export the data to a new CSV file and use the file name `household.csv`.

3. In the resulting `household.csv` file, delete all columns except, `FinServNotes__c`, `Name`, `RecordTypeId`, and `OwnerId`, and any custom fields that you've added.

OwnerId is required only if you want to change OwnerID values so that team members are assigned ownership of household records.

4. In the `household.csv` file, paste the `Id` value that you copied from your earlier query into the `RecordTypeId` field for every household record that you upload.

5. In the `household.csv` file, enter the rest of your household data.

6. In Data Loader, use **Insert** and identify that you are updating the Account object with the data from your updated `household.csv` file. Choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

7. In your org, check for the household records to verify your upload of Account data.

Relate Individuals to Households Using Data Loader

Relate individuals to households using Data Loader.

1. In Data Loader, export households from the Account object to a CSV file. We recommend that you:

   a. Export the data to a new CSV file using the file name `households.csv`.

   b. Choose **Select all fields** when creating your SOQL query. Specify the condition that the value of `RecordTypeId__c = ` ***Record Type ID***, where *Record Type ID* corresponds to the value for `IndustriesHousehold`.

   c. Specify the condition that the value of `RecordTypeId__c = ` ***Record Type ID***, where *Record Type ID* corresponds to the value for `IndustriesHousehold`.

2. In your org, add an individual to any household. Make sure to select all values in the `Activities & Objects to Roll Up` field so that you load only valid values for this picklist field.

3. In Data Loader, export the AccountContactRelation object to a CSV file. We recommend that you:

   a. Select `Show all Salesforce objects`, and then select *Account Contact Relationship (AccountContactRelation)*.

   b. Export the data to a new CSV file using the file name `acr.csv`.

   c. Choose **Select all fields** when creating your SOQL query. Specify the condition that `IsDirect = false AND FinServRollups__c includes ('Tasks')`.

4. In the resulting `acr.csv` file, delete the `CreatedDate`, `CreatedById`, `LastModifiedDate`, `LastModifiedById`, and `SystemModStamp` columns.

5. In the `client_contact.csv` file that you exported during client data upload, copy all the values from the `Id` column and paste them into the `ContactId` column of the `acr.csv` file.

6. For each unique contact ID in the `client_contact.csv` file, determine which household the contact belongs to. Map the corresponding household ID to that contact in the `acr.csv` file. Based on this mapping, copy the values from the `Id` field in the `households.csv` file and paste them into the `AccountId` column of the `acr.csv` file.

7. In the `acr.csv` file, enter the rest of your data to relate individuals to groups.

   Remember these guidelines.

   - `Roles` define an individual's role within the household, such as client, spouse, or dependent.
   - The value of `IsDirect` must be `false` for all records.
   - If the individual is the primary group member, set `FinServPrimary__c` to `true`.
   - In `FinServPrimary__c`, include the items that you want to be summarized at the group level.
   - If the group is the individual's primary group, set `FinServPrimaryGroup__c` to true.
   - If the individual is including a related business entity (for example, a business account) in the group, set `FinServIncludeInPrimaryGroup` to true for the business account.

8. In Data Loader, use **Insert** and select **Show all Salesforce objects**, then identify that you are updating the Account Contact Relationship (`AccountContactRelation`) object with the data from your updated `acr.csv` file. Select **Create or Edit a Map** and choose **Auto-Match Fields to Columns**. Upload your data.

9. In your org, check the membership information in some households to verify your upload of `AccountContactRelation` data.

Upload Financial Account Data Using Data Loader

Add data about individuals' financial accounts using Data Loader.

1. In Data Loader, export the Charges and Fees object to a CSV file. We recommend that you:

    a. Export the data to a new CSV file.

    b. Use the file name `charge_fee.csv`.

    c. Choose **Select all fields** when creating your SOQL query.

2. In the resulting `charge_fee.csv` file, delete the `Id`, `IsDeleted`, `CreatedDate`, `CreatedById`, `LastModifiedDate`,`LastModifiedById`, `SystemModStamp`, `LastActivityDate`, `LastViewedDate`, and `LastReferencedDate` columns.

3. In the `charge_fee.csv` file, enter your data for Charges and Fees records.

    📝 Note: As records are created the value of OwnerID defaults to your user ID. To assign another team member as owner, set the OwnerID to the person's user ID.

4. In Data Loader, use **Insert** and identify that you are updating the Charges and Fee object with the data from your updated `charge_fee.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

5. In Data Loader, use the **Export** option to download the content or the Charges and Fees object. Call the exported file `loaded_charge_fee.csv`. You use this file to identify the ID of charges and feeds items related to Financial Accounts.

6. In your org, create an initial financial account record for each type of financial account, associated with any client: investment account, bank account, and insurance policy. On one of the financial accounts, designate the client as a joint owner.

7. In Data Loader, export the FinancialAccount object to a CSV file. We recomment that you:

    a. Export the data to a new CSV file.

    b. Use the file name `financialaccount.csv`.

    c. Choose **Select all fields** when creating your SOQL query.

8. In the resulting `financialaccount.csv` file, delete the `Id`, `CreatedDate`, `CreatedById`, `LastModifiedDate` ,`LastModifiedById`, `SystemModStamp`, `LastActivityDate`, `LastViewedDate`, `LastReferencedDate`, and `FinServHousehold__c` columns.

9. In the `financialaccount.csv` file, enter the rest of your financial account data.

    We recommend that you use the `loaded_charge_fee.csv` to determine the ID of Charges and Fees items and add that ID to the `fscwmmain__FinancialAccountChargesAndFees__c` column. In the `client_contact.csv` file that you exported during client data upload, copy the values from the `AccountId` column and paste them into the `FinServPrimaryOwner__c` column. For any jointly owned financial account, make sure that you enter the correct `FinServJointOwner__c` value from the `AccountId` column in the `client_contact.csv` file. Ensure that you enter the correct value for `FinServOwnership__c`, using the valid ownership values retrieved in your initial export of financial account data.

10. In Data Loader, use **Insert** and identify that you are updating the Financial Accounts object with the data from your updated `financialaccount.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

11. In your org, check for the new financial account records to verify your upload.

12. In Data Loader, export the FinancialAccount object to a CSV file. Choose the file name `loaded_financial_accounts.csv`. This export file is used later to relate cards, billing statements, financial account transactions, and financial holdings to financial accounts.

13. If you have card data to upload:

    a. In Data Loader, export the Card object to a CSV file.

    b. Export the data to a new CSV file.

    c. Use the file name `card.csv`.

    d. Choose **Select all fields** when creating your SOQL query.

    e. In the resulting `card.csv` file, delete the `Id`, `CreatedById`, `LastModifiedDate`,`LastModifiedById`, `SystemModStamp`, `LastActivityDate`, `LastViewedDate`, and `LastReferencedDate` columns.

    f. In the `card.csv` file, enter your data for Card records.

       To add the relevant references, update `fscwmmain__AccountHolder__c` with the card owner's accountID, which you can look up in the `client_contact.csv` file. Then, update `fscwmmain__FinancialAccount__c` with the financial account's ID, which you can look up in the `loaded_financial_accounts.csv` file.

    g. In Data Loader, use **Insert** and identify that you are updating the Card object with the data from your updated `card.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

    h. In your org, check for the new card records to verify your upload.

14. If you have billing statements to upload:

    a. In Data Loader, export the Billing Statement object to a CSV file.

    b. Export the data to a new CSV file.

    c. Use the file name `statement.csv`.

    d. Choose **Select all fields** when creating your SOQL query.

    e. In the resulting `statement.csv` file, delete the `Id`, `IsDeleted`, `CreatedDate`, `CreatedById`, `LastModifiedDate`,`LastModifiedById`, `SystemModStamp`, `LastActivityDate`, `LastViewedDate`, and `LastReferencedDate` columns.

    f. In the `statement.csv` file, enter your data for billing statement records.

       To add the relevant references, update `fscwmmain__FinancialAccount__c` with the financial account's ID, which you can look up in the `loaded_financial_accounts.csv` file.

    g. In Data Loader, use **Insert** and identify that you are updating the Billing Statement object with the data from your updated `statement.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

    h. In your org, check for the statement records to verify your upload.

15. If you have financial account transactions to upload:

    a. In Data Loader, export the Billing Statement object to a new CSV file using the file name `loaded_statements.csv`. This export file is used to find the details needed to relate financial account transactions to billing statements.

    b. In Data Loader, export the Financial Account Transaction object to a CSV file.

c. Export the data to a new CSV file.

d. Use the file name `transactions.csv`.

e. Choose **Select all fields** when creating your SOQL query.

f. In the resulting `transactions.csv` file, delete the `Id`, `OwnerID`, `IsDeleted`, `CreatedDate`, `CreatedById`, `LastModifiedDate`,`LastModifiedById`, `SystemModStamp`, `LastActivityDate`, `LastViewedDate`, and `LastReferencedDate` columns.

g. In the `transactions.csv` file, enter your data for account transactions records.

To add the relevant references, update `fscwmmain__FinancialAccount__c` with the ID of the financial account the transaction is for and ook up financial account's ID in the `loaded_financial_accounts.csv` file. Next, update `fscwmmain__BillingStatements__c` with the ID of the statement the transaction appears on and look up the statement ID in the `loaded_statements.csv` file. Then, update `OwnerID` with the user ID of the team member who owns the transaction.

h. In Data Loader, use **Insert** and identify that you are updating the Financial Account Transaction object with the data from your updated `transactions.csv` file. Then choose **Create or Edit a Map** and select **Auto-Match Fields to Columns**. Upload your data.

i. In your org, check for the transaction records to verify your upload.

Display Detailed Error Messages to Users

Expedite debugging for your users with detailed error messages that provide insight into field-level security restrictions.

A detailed error message includes information about the access type, fields, and object.

1. From Setup, in the Quick Find box, enter `Custom Settings`, then select **Custom Settings**.

2. Click **Industries Application Config**.

3. Click **Manage** and then click **Edit**.

4. Select **Show Detailed Error Messages**.

5. Save your changes.

Financial Services Cloud Availability and Limitations

Financial Services Cloud works differently from other Salesforce features. Learn about the issues to expect as you implement the app and as your users start to work in it.

EDITIONS

🛑 **Important:** Financial Services Cloud objects such as Financial Account, Financial Account Role, and Assets and Liabilities support up to 70 million records at rest. Data Loader is supported for loads of up to 5 million records. Rollup summary calculations support a load volume of 5 million Financial Account records.

Financial Services Cloud is available in Lightning Experience.

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

To support or load records above these limits, we recommend you work with a Salesforce partner. Or visit AppExchange for a suitable data load partner product. The number of records you can import depends on your permissions and the type of data you're importing. You can import as many records as allowed, as long as you don't exceed the overall data storage limits for your org.

Supported Browsers

Financial Services Cloud is available in any of the Supported Browsers for Lightning Experience.

General Sales Cloud and Service Cloud Compatibility

The Financial Services Cloud documentation describes the Sales Cloud and Service Cloud functionality with which the Financial Services Cloud features work. Salesforce makes no representation regarding Financial Services Cloud features functioning with any other Sales Cloud and Service Cloud functionality not expressly stated in the Financial Services Cloud documentation.

Features Not Supported with Financial Services Cloud

- Accessibility features aren't incorporated.
- Shared Activities aren't supported in group rollup summaries.

General Limitations

Note: These limitations apply to person accounts and the individual object model.

- The number of Financial Account records that you can associate with an account record is limited. Exceeding the number of Financial Account records can cause a query row governor limit error.
- When users create or edit group memberships, group rollup summaries are updated, except when a person is made a member of multiple groups. Group rollup summary data is reflected only for the primary group.
- Lead conversion isn't supported for Group record types, including the Household account record type.
- When multiple currencies is enabled, note these limitations:
  - Financial Services Cloud packaged components don't display record-specific multiple currency settings. Only the user-specific currency settings are displayed. The `Currency Iso Code` field doesn't change currency symbols in packaged components.
  - Advanced currency management isn't available.
  - The `Currency Iso Code` field must be included on page layouts that have a currency field.
  - When filtering by currency values in reports or list views, users must specify a currency ISO code, such as USD or GBP, before the value. For example, `GBP100000`. The ISO code must be one of your org's active currencies.
  - When Multiple Currencies and Rollup By Lookup are both turned on in an org, the currency summary fields on the Account record are reset to the default org currency.
    - To accurately calculate the total financial account value of an Account record, user currency and account currency must match the org default currency.
    - To show commas and symbols correctly on the Financial Account Summary component, a user's locale in Locale Settings and the user's currency must match.
- Localization in Danish, Dutch, French, German, Italian, Japanese, Portuguese (Brazil), Swedish, Hebrew, and Spanish are provided, with the following exceptions.
  - The names of the packaged Advisor, Personal Banker, Relationship Manager, and Client Associate profiles are in English.
  - Financial Services Cloud custom tab labels on the individual and group profile pages are in English. To change tab labels on the profile pages, edit the labels from a custom client record page in the Lightning App Builder.
- Events that are set to repeat by using the IsRecurrence2 field on the event record are excluded from Financial Services Cloud group record rollups. As a result, even if group rollup is enabled and rollups for events or activities is enabled, the FinServ__Household__c

field value on these events isn't set by rollup. Also these repeat events aren't included in component record lists such as the Household (Account) Activities related list.

- Activity rollup fields to a group aren't supported when **Allow Users to Relate Multiple Contacts to Tasks and Events** is enabled.

- Rollup summary fields aren't available in a Partial Copy sandbox. To use roll-up summary fields in a Partial Copy sandbox, create a Full sandbox or install the Financial Services Cloud managed package in a Partial Copy sandbox.

- When you create a CCR or AAR record using the external ID, Salesforce creates an inverse CCR or AAR record and appends "_inverse" to the inverse record's external id. External IDs can be a maximum of 56 characters.

- If you deactivate an Account Contact Relationship between a business and an individual, you can't create an Account Contact Relationship between them. Instead, reactivate the original Account Contact Relationship.

- Financial Services Cloud installation isn't supported on an org with a previously installed version of the Wealth Management app.

- Financial Services Cloud custom components aren't fully supported in the Salesforce mobile app.

- The flows in Financial Services Cloud are available only in English.

- Each Financial Account must have at least one active Financial Account Role of the type Primary Owner, or data loading errors can occur.

- Duplicate Management isn't fully supported. Detection and prevention are supported; record merge isn't supported.

Person Account for Financial Services Cloud Limitations

- The Create Individual - Financial Services Cloud component (the Client Profile Builder) isn't supported.

- Person accounts are displayed as contacts in the Salesforce Inbox sidebar.

- Creating a client record via Salesforce Inbox isn't supported.

Individual Data Model Limitations

- To follow an individual, make sure that you explicitly follow the individual's account and contact records. To follow both account and contact records automatically, contact your Salesforce representative.

- In Financial Services Cloud, the unified object view of an individual relies on the Contact redirect. In the Retail Banking Console, this redirect might be disabled in your org.

- When you create an individual account, the name fields on Account and Contact are synchronized. Financial Services Cloud account names don't include salutations, middle names, or suffixes. For example, Dr. John Michael Smith Jr. appears as John Smith.

- Access to individual and group profiles on the Salesforce mobile app isn't fully supported. For more information, see Modify the Salesforce Mobile App Navigation Menu.

- Deleting an individual via Salesforce Inbox isn't supported.

- Creating a client record via Salesforce Inbox isn't supported.

- Considerations for Converting Leads in Financial Services Cloud.

Client Segmentation App Limitations

A CRM Analytics Growth, CRM Analytics Plus, or CRM Analytics for Financial Services license is required to access full CRM Analytics capabilities.

Table 33: Client Segmentation App Limitations

Capability	CRM Analytics Growth or Plus; CRM Analytics for Financial Services	Client Segmentation App
Data sources	Salesforce and external data	Salesforce data
Object support	Standard and custom objects	Standard and custom objects
Data volume	• CRM Analytics Plus: 10 billion rows • CRM Analytics Growth: 100 million rows	10 million rows
Customize existing dashboards?	Yes	No
Create dashboards?	Yes	No
Customize existing datasets?	Yes	No
Create datasets?	Yes	No
Create custom CRM Analytics apps?	Yes	No
Supports Einstein Discovery and Experience Cloud integration?	Yes	No
Supports bulk actions and APEX steps?	Yes	No
Supports Sales Cloud Einstein AI?	No	No
Supports Salesforce Inbox?	No	No

CRM Analytics for Financial Services gives you the same access to CRM Analytics capabilities as the CRM Analytics Growth and Plus licenses. Consult this chart to see any limitations.

Table 34: CRM Analytics for Financial Services Limitations

Capability	CRM Analytics Growth or Plus; CRM Analytics for Financial Services
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	• CRM Analytics Plus: 10 billion rows • CRM Analytics Growth: 100 million rows
Customize existing dashboards?	Yes
Create dashboards?	Yes
Customize existing datasets?	Yes
Create datasets?	Yes
Create custom CRM Analytics apps?	Yes
Supports Einstein Discovery and Experience Cloud integration?	Yes

Capability	CRM Analytics Growth or Plus; CRM Analytics for Financial Services
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein AI?	No
Supports Salesforce Inbox?	No

Experience Cloud Site Limitations

- Partner Community, Customer Community Plus (CCP), or Customer Community licenses are required. Experience Cloud license restrictions and limitations apply.

- For advanced sharing, such as sharing financial account records across multiple owners, Partner Community or CCP licenses are required.

- Manual provisioning must be completed in Salesforce Classic.

- In Financial Services Cloud, if the org enforces private sharing on accounts and contacts, guest self-registration fails when the account owner is changed.

- Other provisioning methods aren't supported.

- Financial Services Cloud components aren't compatible with Lightning Out.

- Task queues aren't supported in Experience Builder pages.

Financial Services Cloud Printed Resources

In addition to online help, the Financial Services Cloud has guides to help you learn about and successfully administer your Financial Services Cloud features.

If you're looking for the HTML version of our developer doc, head over to Salesforce Developer Documentation and search for your feature there.

Financial Services Cloud Installation Guide

Financial Services Cloud Admin Guide

SEE ALSO:

Financial Services Cloud Admin Guide