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# Financial Services Cloud Installation Guide

Salesforce, Summer '25

## Summer '25





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# GET READY TO USE FINANCIAL SERVICES CLOUD

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



**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.

## [Pre-Installation Tasks for Accounts and User Profiles](#)

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

## [Pre-Installation Tasks for Lightning Experience](#)

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

### EDITIONS

Available in: Lightning Experience

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

## Pre-Installation Tasks for Accounts and User Profiles

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

### 1. [Enable the Contacts to Multiple Accounts Feature](#)

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

### 2. [Create the User Profiles](#)

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

### EDITIONS

Available in: Lightning Experience

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

## Enable the Contacts to Multiple Accounts Feature

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

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

### EDITIONS

Available in: Lightning Experience

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

## Create the User Profiles

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

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

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

### EDITIONS

Available in: Lightning Experience

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

## Pre-Installation Tasks for Lightning Experience

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

1. [Enable Lightning Experience](#)

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

### EDITIONS

Available in: Lightning Experience

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

## Enable Lightning Experience

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

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



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

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

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

### EDITIONS

Available in: Lightning Experience

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

# FINANCIAL SERVICES CLOUD PACKAGES

Financial Services Cloud functionality is available from two packages.

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

## [Install the Managed Package](#)

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

## [Install the Unmanaged Extension Packages](#)

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

### EDITIONS

Available in: Lightning Experience


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

## Install the Managed Package

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

1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Cloud managed package.
2. Paste the URL into your browser navigation bar, and press Enter.
3. If you received a password from Salesforce, enter it.
4. Select **Install for Specific Profiles**.
5. Scroll to the Select Specific Profiles section, and map the profiles that you created in the pre-installation tasks to the package profiles. For the Advisor profile, set the access level to **Advisor**. For the Personal Banker profile, set the access level to **Personal Banker**. For the Relationship Manager profile, set the access level to **Relationship Manager**.
6. Click **Install**.  
If the installation takes a while, you can click **Done** and the installation completes in the background. Check your email for confirmation that the installation was successful.

If the package installation fails, see [Why did my installation or upgrade fail?](#)

 **Note:** If you test the package installation using an Apex test, the test might return an error due to hard-coded elements such as date format. For this reason, an Apex test is not recommended.

### EDITIONS

Available in: Lightning Experience

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

## Install the Unmanaged Extension Packages

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

1. In the Product Specific Terms section of your order form, copy the URL for the Financial Services Ext unmanaged package.
  2. Paste the URL into your browser navigation bar and press Enter.
  3. If you received a password from Salesforce, enter it.
  4. Select **Install for Specific Profiles**.
  5. Scroll to the Select Specific Profiles section, and map the profiles that you created in the pre-installation tasks to the package profiles. For the Advisor, Personal Banker, and Relationship Manager profiles, set the access level to **Full Access**.
  6. Click **Install**.  
If the installation takes a while, you can click **Done** and the installation completes in the background. Check your email for confirmation that the installation was successful.
  7. Repeat the steps for the unmanaged referral package and unmanaged commercial banking extension package.
- If the package installation fails, see [Why did my installation or upgrade fail?](#)

### EDITIONS

Available in: **Lightning Experience**

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

### [Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes](#)

Install the unmanaged extension package after you install the Financial Services Cloud managed package. The unmanaged package extension for Financial Services Cloud Service Processes for retail banking offers pre-configured and customizable retail banking service processes built using Service Process Studio. Each process includes an OmniScript for request intake through assisted and self-service channels. It features flows and email templates for streamlined fulfillment, and BIAN-inspired outbound Mulesoft APIs for integration with core banking and other external systems.

### [Install the Unmanaged Extension Package for Prebuilt Wealth Management Service Processes](#)

Install the unmanaged extension package after you install the Financial Services Cloud managed package. The unmanaged package extension for Financial Services Cloud Service Processes for Wealth Management offers pre-configured and customizable wealth management service processes built using Service Process Studio. Each process includes an OmniScript for request intake through assisted and self-service channels. It features flows and email templates for streamlined fulfillment, and BIAN-inspired outbound Mulesoft APIs for integration with Custodial or Books and Records platform.



## Install the Unmanaged Extension Package for Prebuilt Retail Banking Service Processes

Install the unmanaged extension package after you install the Financial Services Cloud managed package. The unmanaged package extension for Financial Services Cloud Service Processes for retail banking offers pre-configured and customizable retail banking service processes built using Service Process Studio. Each process includes an OmniScript for request intake through assisted and self-service channels. It features flows and email templates for streamlined fulfillment, and BIAN-inspired outbound Mulesoft APIs for integration with core banking and other external systems.

Before you begin:

- To run the retail banking service processes in your Salesforce org, you must install OmniStudio package version 246.5 or later.
  - Enable Lightning web security for LWC in Session Settings. See [Enable Lightning Web Security in an Org](#).
1. To install the package, paste this [URL](#) into your browser navigation bar and press **Enter**.
  2. Log in to the org in which to install the package.
  3. If you want to provide package access to the installing admin's profile or any profile with Customize Application permission, select **Install for Admins Only**.
  4. If you want to provide package access to all internal custom profiles, select **Install for All Users**.
  5. If you want to provide package access to specific profiles in your org, select **Install for Specific Profile**. You can set each profile to have full access or no access for the new package and all its components.
  6. To see an overlay with the list of components in the package, click **View Components**.
  7. Click **Install**.

The installation can take some time. To complete the installation in the background, click **Done**. Check your email for confirmation that the installation was successful.

If the package installation fails, see [Why did my installation or upgrade fail?](#)

### EDITIONS

Available in: Lightning Experience

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

## Install the Unmanaged Extension Package for Prebuilt Wealth Management Service Processes

Install the unmanaged extension package after you install the Financial Services Cloud managed package. The unmanaged package extension for Financial Services Cloud Service Processes for Wealth Management offers pre-configured and customizable wealth management service processes built using Service Process Studio. Each process includes an OmniScript for request intake through assisted and self-service channels. It features flows and email templates for streamlined fulfillment, and BIAN-inspired outbound Mulesoft APIs for integration with Custodial or Books and Records platform.

- To run the wealth management service processes in your Salesforce org, you must install OmniStudio package version 246.5 or later.
  - Enable Lightning web security for LWC in Session Settings. See [Enable Lightning Web Security in an Org](#).
1. To install the package, paste this [URL](#) into your browser navigation bar and press **Enter**.
  2. Log in to the org in which to install the package.

### EDITIONS

Available in: Lightning Experience

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


3. If you want to provide package access to the installing admin's profile or any profile with Customize Application permission, select **Install for Admins Only**.
4. If you want to provide package access to all internal custom profiles, select **Install for All Users**.
5. If you want to provide package access to specific profiles in your org, select **Install for Specific Profile**. You can set each profile to have full access or no access for the new package and all its components.
6. To see an overlay with the list of components in the package, click **View Components**.
7. Click **Install**.

The installation can take some time. To complete the installation in the background, click **Done**. Check your email for confirmation that the installation was successful.

If the package installation fails, see [Why did my installation or upgrade fail?](#)

# POST-INSTALLATION TASKS

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

 **Note:** The Financial Services Cloud managed package includes several validation rules enabled for different packaged objects. Modifying or deactivating these validation rules can result in data model integrity errors.

## [Configure Navigation to Individual and Group Profiles](#)

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

### [Lightning Pages Setup](#)

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

### [Add Values to the Lead Status Picklist](#)

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

### [Add Values to the Opportunity Stage Picklist](#)

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

### [Add Users](#)

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

### [Page Layouts and Global Actions Setup](#)

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

### [Add Customer Roles](#)

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

#### EDITIONS

Available in: Lightning Experience

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

## Configure Navigation to Individual and Group Profiles

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

1. From Setup, open **Object Manager**, open **Contact**, and click **Buttons, Links, and Actions**.
2. Next to View, select **Edit**.
3. Under Salesforce Classic Override, select **Visualforce Page**, and then select **ContactDetailRedirect [FinServ\_ContactDetailRedirect]** from the dropdown.
4. Save your changes.

#### EDITIONS

Available in: Lightning Experience

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

## Lightning Pages Setup

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

### 1. [Assign a Home Page Layout to Specific Apps, Record Types, and Profiles](#)

Assign Financial Services Cloud home pages to different apps and app-and-profile combinations to give your users access to a Home page perfect for their role.

### 2. [Assign Lightning Pages to Display Financial Services Cloud Data](#)

You can assign different Lightning pages to the various Financial Services Cloud apps to display specific account record types. You can also choose which profiles can access the page. The two-column page layout is ideal for the Retail Banking app, the one-column layout is best suited to the Retail Banking Console, and the three-column suits both apps.


#### EDITIONS

Available in: Lightning Experience

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

## Assign a Home Page Layout to Specific Apps, Record Types, and Profiles

Assign Financial Services Cloud home pages to different apps and app-and-profile combinations to give your users access to a Home page perfect for their role.

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

1. From Setup, enter *Lightning App Builder* in the Quick Find box, and then select **Lightning App Builder**.
2. Click **View** next to the Lightning page that you want to assign as a home page, as shown in the table.
3. Click **Activation**.
4. If you created a page or opened a page that needs adjustment, make the necessary changes, click **Save**, and then click **Activate**.
5. On the activation screen, click the tab to assign the page to a combination of Lightning apps, record types, and profiles.
6. Follow the steps to activate the page.
7. Review and save your changes.

#### EDITIONS

Available in: Lightning Experience

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

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

## Assign Lightning Pages to Display Financial Services Cloud Data

You can assign different Lightning pages to the various Financial Services Cloud apps to display specific account record types. You can also choose which profiles can access the page. The two-column page layout is ideal for the Retail Banking app, the one-column layout is best suited to the Retail Banking Console, and the three-column suits both apps.

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.

### EDITIONS

Available in: Lightning Experience

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

Lightning Page Name	App	Record Type	Profile
Client Record Page	Wealth Management	Individual	Advisor, System Admin
Client Record Page	Wealth Management	Household	Advisor, System Admin
Banking Business Account Page	Retail Banking, Retail Banking Console	Business	Advisor, Personal Banker, System Admin
Banking Business Contact Page	Retail Banking, Retail Banking Console	Business	Advisor, Personal Banker, System Admin
Banking Household Page - One Column	Retail Banking Console	Household	Advisor, Personal Banker, System Admin
Banking Household Page - Two Column	Retail Banking	Household	Advisor, Personal Banker, System Admin
Banking Individual Page - One Column	Retail Banking Console	Individual	Advisor, Personal Banker, System Admin
Banking Individual Page - Two Column	Retail Banking	Individual	Advisor, Personal Banker, System Admin

## Add Values to the Lead Status Picklist

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

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

### EDITIONS

Available in: Lightning Experience

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

## Add Values to the Opportunity Stage Picklist

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

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

We suggest these percentages: Assessment Needed—25, Develop Proposal—50, Client Presentation—75, and Initiate Transfer—90.
  - d. Save your changes.
4. Configure the sales processes.
  - a. From Setup, enter *Sales Processes* in the Quick Find box, and then select **Sales Processes**.
  - b. Click **Opportunity Process**.
  - c. Remove any existing values from Selected Values and add the stages created above.
  - d. Save your changes.
  - e. Repeat these steps for Wallet Share.

### EDITIONS

Available in: Lightning Experience

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

## Add Users

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

### 1. [Configure User Profile Permissions](#)

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

### 2. [Create Users](#)

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

#### EDITIONS

Available in: Lightning Experience

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

## Configure User Profile Permissions

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

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

1. From Setup, enter *Profiles* in the Quick Find box, and then select **Profiles**.
2. Click **Advisor**:
  - a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.
  - b. In the Field-Level Security section, select **View** next to **Event**. Edit the event, and enable read access for the Type field.
  - c. In the Record Type Setting section, verify the Events defaults to Advisor Event, Leads defaults to Person Referrals, Opportunities defaults to Opportunity (Wallet Share), and Tasks defaults to Advisor Task.
  - d. In the Administrative Permissions section, enable the **View Dashboards in Public Folders** and **View Reports in Public Folders** permissions.
  - e. In the General User Permissions section, enable the **Drag-and-Drop Dashboard Builder**, **Edit Case Comments**, **Import Leads**, **Manage Cases**, **Manage Leads**, **Transfer Cases**, **Transfer Leads**, and **View My Team's Dashboards** permissions.
3. Click **Personal Banker**:
  - a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.
  - b. In the Record Type Setting section, for Standard Record Type Settings, ensure that Leads defaults to Person Referrals, Leads defaults to Person Referrals, Opportunities include the Opportunity (Wallet Share), and defaults to General, and Task is set to Master.
  - c. In the Record Type Setting sections, for Customer Record Type Setting, verify whether Billing Statements include Credit and Debit, and defaults to Credit.
4. Click **System Administrator**:
  - a. In the Field-Level Security section, select **View** next to **Task**. Edit the task, and enable read access for the Type field.

#### EDITIONS

Available in: Lightning Experience

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

- b.** In the Record Type Setting section, ensure that Events defaults to Advisor Event., Leads defaults to Person Referrals, Opportunities defaults to Opportunity (Wallet Share), and Tasks defaults to Advisor Task

## Create Users

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

## EDITIONS

Available in: Lightning  
Experience

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

1. Create a user.
    - a. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
    - b. Create a user. Assign it the Salesforce user license and the Advisor, Personal Banker, or Relationship Manager profile.
    - c. Save your changes.
  2. Assign permission sets.
    - a. Click **Permission Set Assignments**, and then click **Edit Assignments**.
    - b. Under Available Permission Sets, choose the permission sets and click **Add**.
    - c. For users with the Personal Banker profile, add the Financial Services Cloud Standard and Personal Banker Access permission sets.
    - d. For users with the Advisor profile, add the Financial Services Cloud Standard and Advisor Access permission sets.
    - e. For users with the Relationship Manager profile, add the Financial Services Cloud Standard and Relationship Manager Access permission sets.
    - f. Save your changes.
- Available in: Lightning Experience

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

## Page Layouts and Global Actions Setup

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

## EDITIONS

Available in: Lightning Experience

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

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



## Add Global Actions to Publisher Layouts

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

1. Replace the default actions available to users in the Salesforce mobile app and Lightning Experience.
  - a. From Setup, enter *Global Actions* in the Quick Find box, and then select **Publisher Layouts**.
  - b. Select **New**.
  - c. Name the publisher layout, such as Advisor Publisher Layout.
  - d. Save your changes.
  - e. In the Salesforce Mobile and Lightning Experience Actions section, select the override option.
  - f. Remove these actions: **New Event**, **New Task**, and **Log a Call**.
  - g. In the palette, select the **Mobile & Lightning Actions** category. D
  - h. Drag the actions **FinServ\_\_NewEventAdvisor**, **FinServ\_\_NewTaskAdvisor**, and **FinServ\_\_LogACallAdvisor** to the Salesforce Mobile and Lightning Experience Actions section. Make sure that you're dragging the correct actions by hovering over the action and checking the name .
  - i. Save your changes.
2. Assign the Advisor Publisher Layout to the Advisor profile.
  - a. From the list of Global Publisher Layouts, click **Publisher Layout Assignment**.
  - b. Select **Edit Assignment**.
  - c. In the table, select the cell for the Advisor profile, and choose **Advisor Publisher Layout** from the dropdown list.
  - d. In the table, select the cell for the Personal Banker profile, and choose **RB Global Layout** from the dropdown list.
  - e. In the table, select the cell for the Relationship Manager profile, and choose **RB Global Layout** from the dropdown list.  
If you have created other profiles, assign them these layouts as needed.
  - f. Save your changes.

### EDITIONS

Available in: Lightning Experience

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

## Configure the Account Contact Relationship Page Layout

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

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

### EDITIONS

Available in: Lightning Experience

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

## Add Customer Roles

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

1. From Setup, open **Object Manager**, open **Account Contact Relationships**, then click **Fields & Relationships**.
2. Select **Roles**.
3. Delete the standard Salesforce roles picklist values.
4. Add picklist values as needed.  
We suggest the roles. Client, Dependent, Domestic Partner, Spouse, Grantor ,Beneficiary, Board Member, Employee, Trustee, and Other.
5. Save your changes.

### EDITIONS

Available in: Lightning Experience

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

# DEPLOY THE CLIENT SEGMENTATION APP

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



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

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

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

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

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



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

## [Enable CRM Analytics](#)

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

## [Assign Client Segmentation App App Administrator Permissions](#)

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

## [Assign Client Segmentation App User Permissions](#)

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

## [Get Your Data Ready to Create the Client Segmentation App](#)

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

## [Set Field-Level Security to Enable Creation of the Client Segmentation App](#)

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

## [Create and Share an App from the Client Segmentation App Template](#)

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

## [Schedule the Data Synch and Dataflow for the Client Segmentation App](#)

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

[Understand Client Segmentation App Limitations](#)

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

SEE ALSO:

[Use Financial Services Cloud CRM Analytics Solutions](#)

[CRM Analytics Limitations](#)

## Enable CRM Analytics

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



**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 Client Segmentation App App Administrator Permissions”.

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

SEE ALSO:

[Assign Client Segmentation App App Administrator Permissions](#)

## Assign Client Segmentation App App Administrator Permissions

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

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

## Assign Client Segmentation App User Permissions

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

1. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
2. Click the name of a user who requires access to the Client Segmentation App app.
3. Click **Permission Set Assignments**, and then click **Edit Assignments**.
4. Select the Client Segmentation Analytics User permission set.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to view the Client Segmentation App app.

## Get Your Data Ready to Create the Client Segmentation App

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

Your org must have at least the following data:

- One record in the FinancialAccount object
- Record types

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

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

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

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

### 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.

### 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 4 for all objects with fields you want to use.
6. Refresh your browser cache.

You can now create the Client Segmentation App app.

## Create and Share an App from the Client Segmentation App Template

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

SEE ALSO:

[Set Field-Level Security to Enable Creation of the Client Segmentation App](#)

### Create the App


1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Client Segmentation App**. Then click **Continue**.
4. 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.
5. Name your app and click **Create**.
6. View the status of app creation on the next page. The process takes a minute or two. Once it's complete, refresh the page to see your app.



**Note:** If you see an error saying the Analytics Integration User does not have access to selected fields, edit Salesforce field-level security so the Integration User has the required access.

### Share the App

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the Client Segmentation App admin or user permission sets.

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**.

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

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

## Understand Client Segmentation App Limitations

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

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

**Table 1: 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 objects only
Data volume	<ul style="list-style-type: none"> <li>CRM Analytics Plus: 10 billion rows</li> <li>CRM Analytics Growth: 100 million rows</li> </ul>	10 million rows
Can customize existing dashboards?	Yes	No
Can create dashboards?	Yes	No
Can customize existing datasets?	Yes	No
Can create datasets?	Yes	No
Can create custom CRM Analytics apps?	Yes	No
Supports Einstein Discovery and Community Cloud integration?	Yes	No
Supports bulk actions and APEX steps?	Yes	No
Supports Sales Cloud Einstein artificial intelligence?	No	No
Supports Salesforce Inbox?	No	No