Actionable Relationship Center

Last Updated:2026.02.25

CONTENTS

Actionable Relationship Center

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.

REQUIRED EDITIONS

View supported product editions.

Actionable Relationship Center Editions and Permissions
Review the supported products and editions for Actionable Relationship Center (ARC). Then learn about how your product handles permissions and how to assign them.

Create a Custom ARC Relationship Graph
Create Actionable Relationship Center (ARC) graphs to see custom visualizations of relationships among people, businesses, and other associated related lists on record pages.

Customize Record Pages Using ARC Components
Use the Lightning App Builder to add, remove, or reorder ARC components on a record page to give users a customized view of relationship graphs.

Customize Experience Cloud Templates Using ARC Components
Add ARC components to Experience Cloud pages so your partner users can view ARC Relationship Graphs.

Explore an ARC Relationship Graph
View and explore relationships among records on an ARC graph.

Actionable Relationship Center Considerations and Limitations
Here are some things to keep in mind when you implement Actionable Relationship Center (ARC).

Actionable Relationship Center Editions and Permissions

Review the supported products and editions for Actionable Relationship Center (ARC). Then learn about how your product handles permissions and how to assign them.

User Interface

The Actionable Relationship Center feature is available in Lightning Experience.

Editions

- Automotive Cloud: Enterprise, Unlimited, and Developer Editions
- Communications Cloud: Enterprise, Performance, and Unlimited Editions
- Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions
- Energy & Utilities Cloud: Enterprise, Performance, and Unlimited Editions
- Financial Services Cloud: Professional, Enterprise, and Unlimited Editions
- Health Cloud: Enterprise and Unlimited Editions
- Insurance Cloud: Professional, Enterprise, and Unlimited Editions
- Manufacturing Cloud: Enterprise, Unlimited, and Developer Editions
- Media Cloud: Enterprise, Performance, and Unlimited Editions
- Net Zero Cloud Growth: Enterprise, Performance, and Unlimited Editions
- Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions
- Public Sector Solutions: Enterprise, Performance, Unlimited, and Developer Editions

Required ARC Permissions

To use ARC, Salesforce admins and users need the user permission Access Actionable Relationship Center. Typically, a Salesforce admin assigns a permission set, which includes this user permission. Because this feature is included in multiple products, the products and licenses in your org determine which permission set is available.

Most products use the same permission set.

Permission Set	Available In These Products
ARC Access	• Automotive Cloud

Permission Set	Available In These Products
	• Communications Cloud • Energy and Utilities Cloud • Insurance Cloud • Manufacturing Cloud • Media Cloud • Nonprofit Cloud • Public Sector Solutions

Some products provide different permission sets or permission set groups.

Product	Permission Set or Permission Set Group	Notes
Education Cloud	• Education Cloud Limited Access • Education Cloud Full Access • Education Cloud for Experience Cloud Access	The Education Cloud for Experience Cloud Access permission set includes the user permission Access Actionable Relationship Center for Partner Users.
Financial Services Cloud	• Financial Services Cloud Comprehensive • Financial Services Cloud Extension	
Health Cloud	• Health Cloud Foundation • Health Cloud Starter	The user permission Access Actionable Relationship Center is included in other Health Cloud permission sets, but is disabled by default. If you use one of those permission sets, enable the user permission first.
Nonprofit Cloud	• Fundraising_User • Fundraising_Admin	You can use the ARC Access permission set or for your convenience, you can assign one of these permission set groups.

Don't see your product here? Contact your account executive for more information. Or look for a permission set that includes the user permission Access Actionable Relationship Center. To see what's included in a permission set, click **View Summary** on the permission set's detail page in Setup. Review your cloud's documentation, too.

Omnistudio

Use Flexcards to show your users at-a-glance contextual information and provide them with access to relevant tasks for the data in an ARC graph. If you customize ARC with Omnistudio, assign Omnistudio permission sets.

Customizing Permissions

If you customize ARC, such as adding fields, create a custom permission set. To remove user permissions from the default permission set, create a muting permission set. Then, use permission set groups to assign users the ARC permission set in addition to your custom permission sets. This approach ensures users always have the latest default permissions and is an alternative to cloning permission sets.

See Also
Assign and Manage Permission Set Assignments
Permission Set Groups
Manage Muting Permission Sets

Create a Custom ARC Relationship Graph

Create Actionable Relationship Center (ARC) graphs to see custom visualizations of relationships among people, businesses, and other associated related lists on record pages.

REQUIRED EDITIONS

View supported product editions.

An Omniscript gives your users a guided path for completing a business process and serves as a configurable way of creating a seamless experience for your users. To build your Omniscripts, go to Omnistudio. Then in an ARC graph, to give your users quick access to processes they complete often, add the Omniscript to a node.

Show Fields from Multiple Objects on One ARC Node

On an ARC Graph node, show fields from objects that share a lookup relationship to the node object. Find the objects that have a lookup relationship to the node object on the Display tab in the show field picklist.

Customize ARC Nodes using Flexcards

Use Flexcards to show your users at-a-glance contextual information and provide them with access to relevant tasks for the data in an ARC graph. In Omnistudio, the drag-and-drop elements let you build Flexcards quickly to show your users contextual information in an at-a-glance format and provide them with access to relevant tasks for the data in an ARC graph.

Customize Actionable Relationship Center Graph Views on a Record

Customize graphs on records to show only the records you need. Change which objects appear in the graph, apply filters to show records based on certain criteria, sort records, and save custom views with applied filters.

Create a Relationship Graph in Actionable Relationship Center

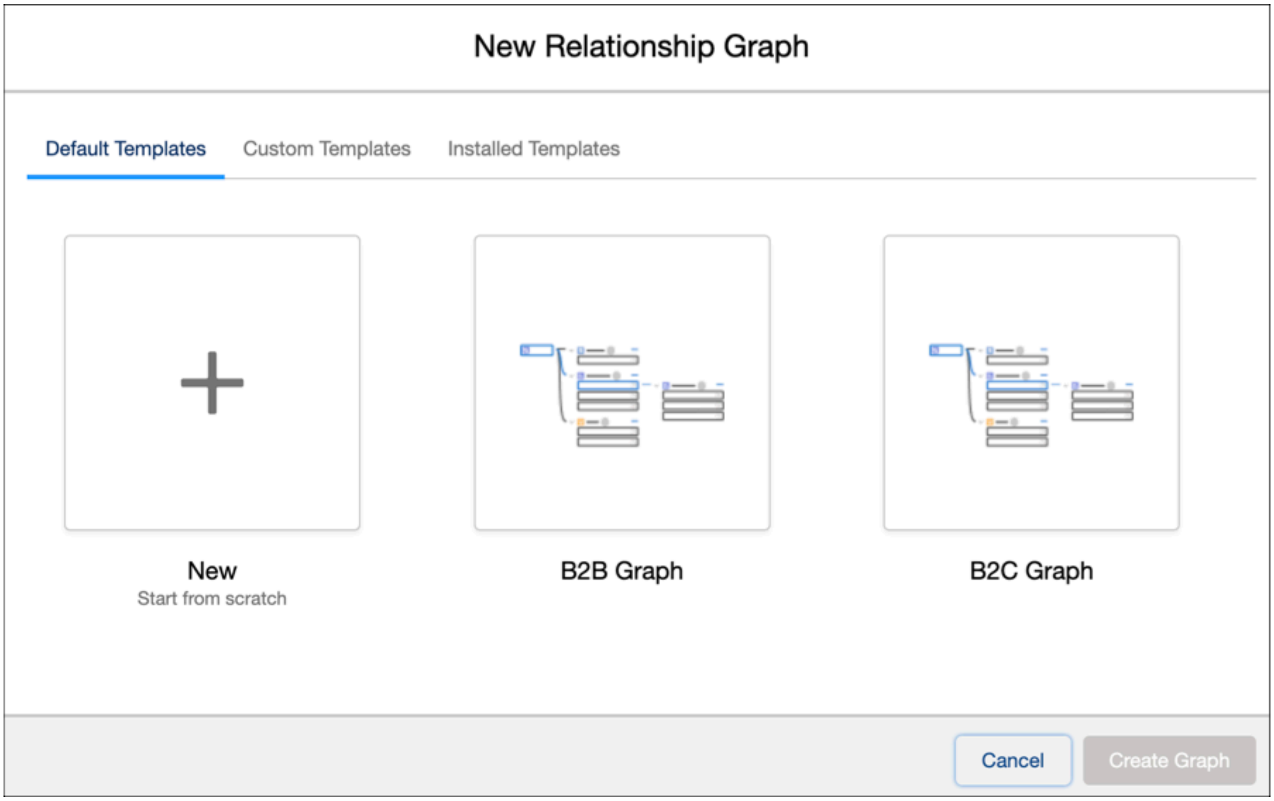
Show how records relate to each other.

REQUIRED EDITIONS

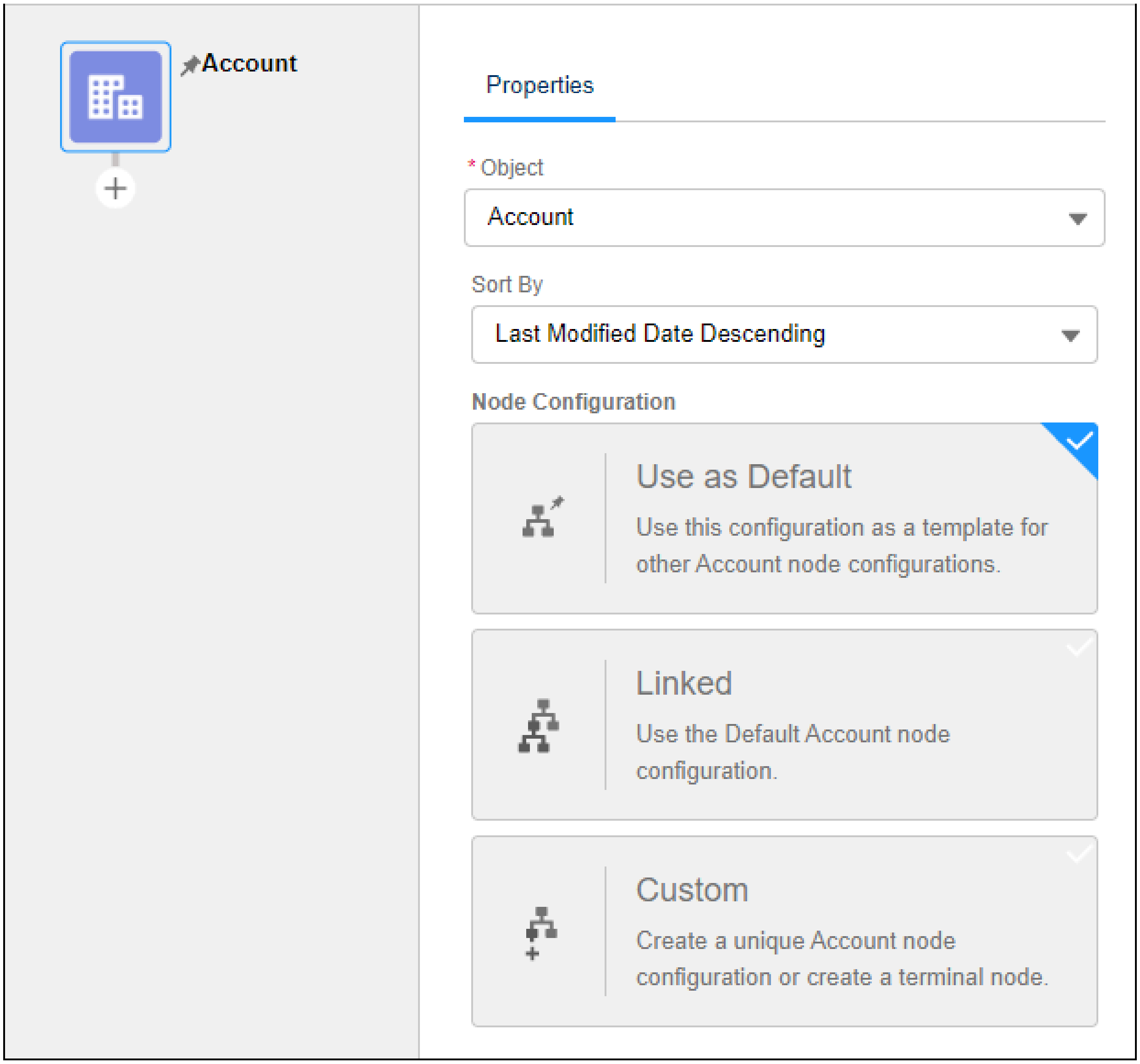
View supported product editions.

USER PERMISSIONS NEEDED	
To create a relationship graph in ARC:	View permissions information.

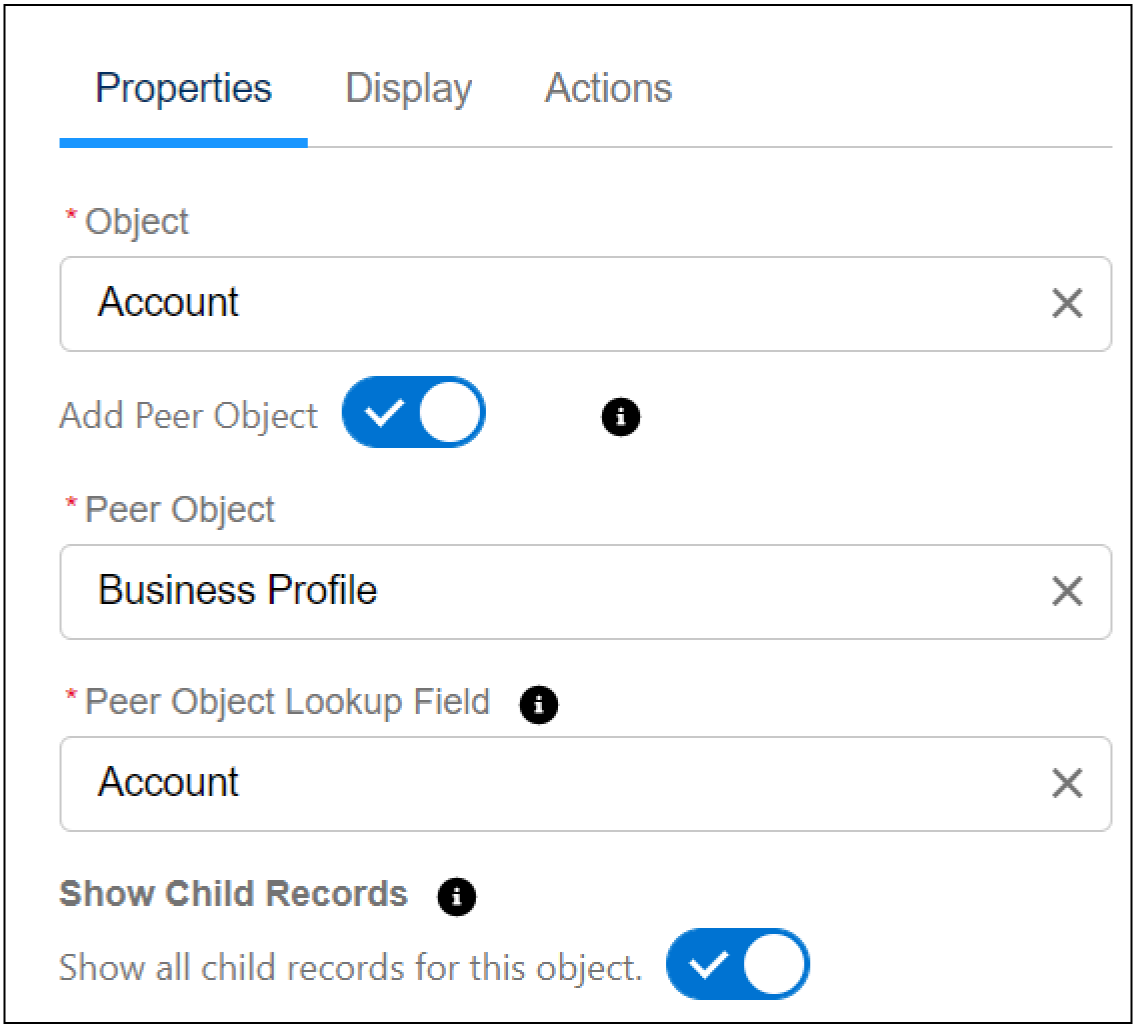
1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.
2. Click **New Relationship Graph**.
3. Select a graph template and click **Create Graph**.
   - Default Templates: Included in your Salesforce org.
   - Custom Templates: Created by you.
   - Installed Templates: Created by a third party.



4. Specify the Graph Properties.
   a. Enter a label, for example, `Business Accounts`, and a unique developer name.
      When you add the ARC Relationship Graph component to a record page, the label shows in the list of available graphs.
   b. To save the graph configuration as a custom template to use later, select **Set as Template**.
   c. Select a graph display type.
      - **Horizontal Hierarchy** is the default view on a record page. When a user clicks a node, new nodes appear from left to right.
      - **Vertical Hierarchy** shows nodes vertically on a record page. When a user clicks a node, new nodes appear from top to bottom.
   d. To enable users to customize graphs, turn on Customize Views.
      When Customize Views is turned on, users can change the objects that appear in the graph, apply filters to show records based on certain criteria, sort records, and save custom views with applied filters.
5. Click the root node on the graph and on the Properties tab, add the details of the root node.
   a. Select an object, for example, Account.
   b. In Sort By, select the order to sort the records in the node.
   c. Select a node configuration.
      - Default: Save the configuration as a template for other node configurations of the same object.
      - Linked: Use the Default node configuration of the target object.
      - Custom: Create a unique object node configuration or create a terminal node.



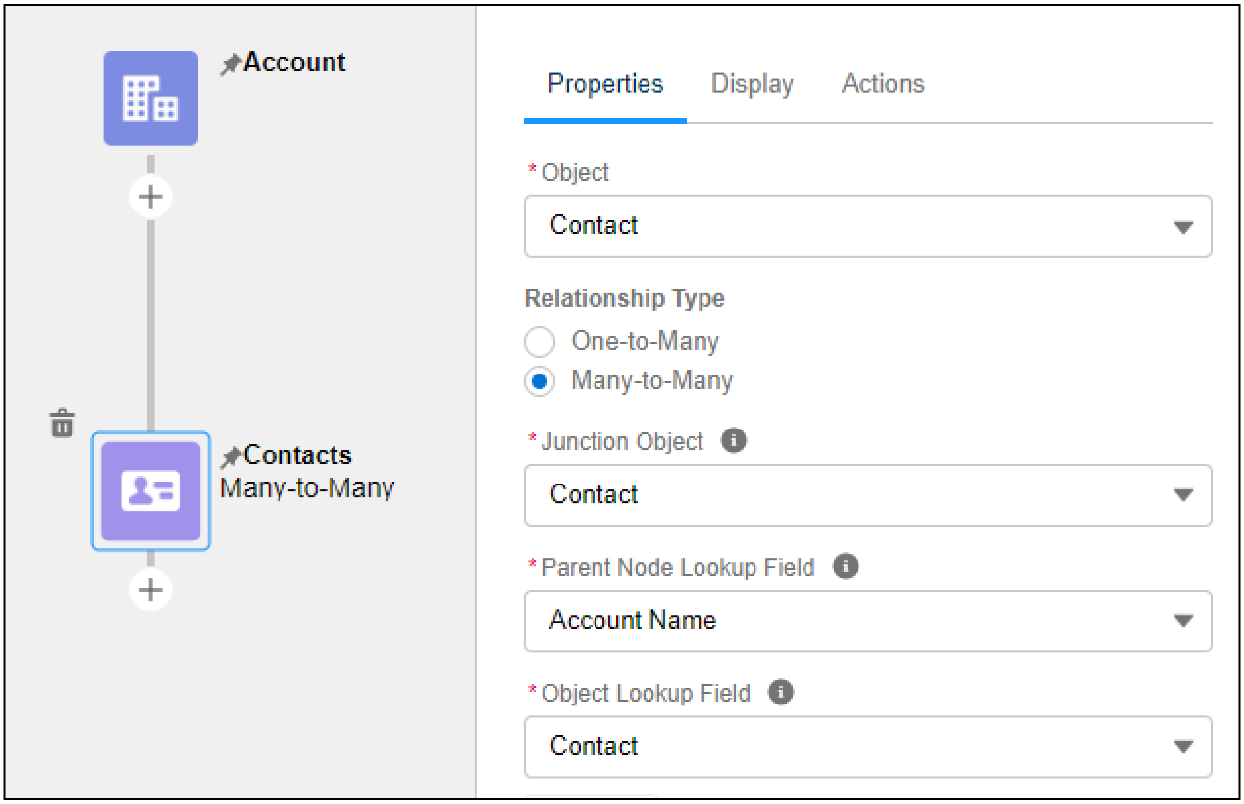
6. Add child nodes to the relationship graph. Under the root node, click the plus icon.
7. On the Properties tab, add the details of the child node.
   a. Select an object, for example, Contact.
   b. If necessary, select a peer object.
      Select an object with a one-to-one lookup relationship to the node object. You can select fields on the object and peer object to show on the node.
   c. If necessary, select **Show Child Records**.
      Show all of the object records and its child records in one node on the ARC graph. To enable this setting, you can have only 1 child node on the object.



d. Select **One-to-Many** relationship type and then select a Parent Node Lookup field.
   The lookup field is a field from the node object (for example, Contact) that points to the parent node object (for example, Account).

   Tip The one-to-many relationship type allows each record of one object to be linked to multiple records from another object. Many-to-many relationship type allows each record of one object to be linked to multiple records from another object, and vice versa. The many-to-one relationship type uses a lookup relationship to link many records from an object to a single record from another object.

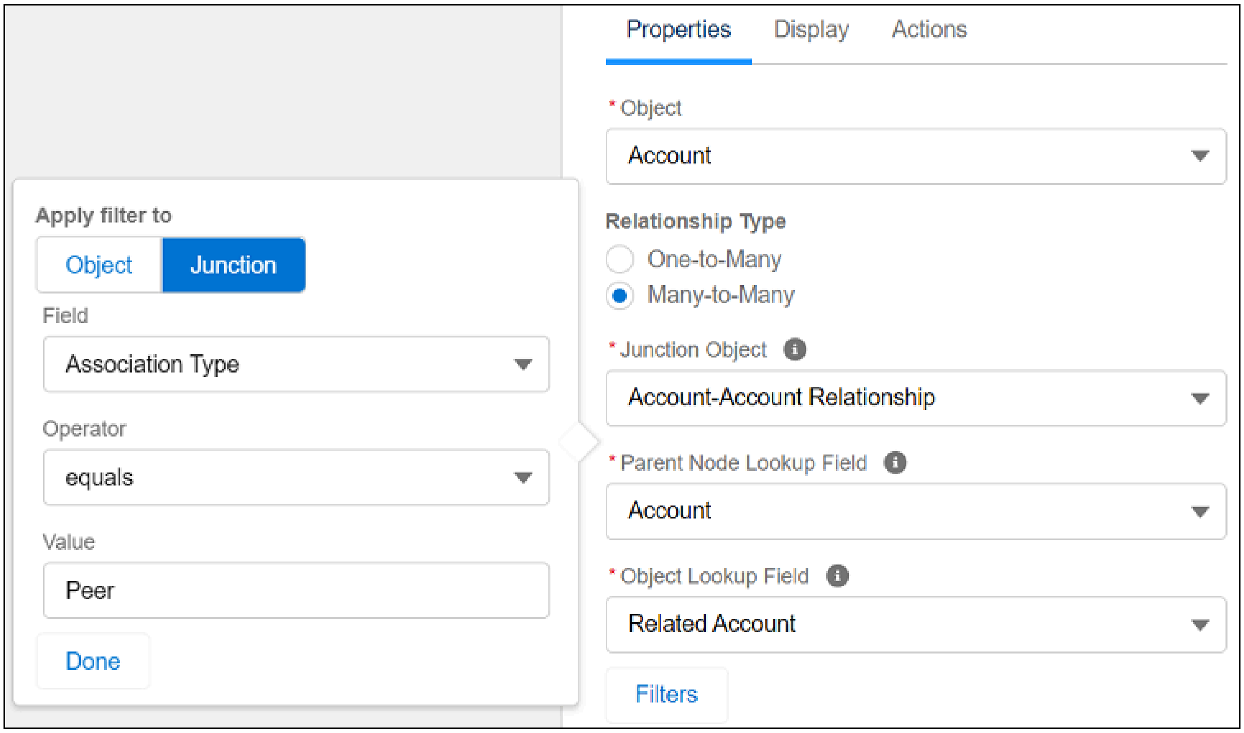
e. OR, select **Many-to-Many** relationship type, and then specify the objects and fields.
   - Junction Object: When you model a many-to-many relationship, select a junction object to connect the two objects you want to relate to each other, for example, Contact.
   - Parent Node Lookup Field: Select a field from the junction object that points to the parent node object, for example, Account Name.
   - Object Lookup Field: Select a field from the junction object that points to this node's object, for example, Contact.



f. OR, select **Many-to-One** relationship type, and then select a lookup field on the parent node. The lookup field is a field from the node object, for example, Contact, that points to the parent node object, for example, Account.

g. To determine the records that are collected in the node, click **Filters**.
   - Select what the filter applies to, either **Object**, **Junction**, or **Peer**.
   - In Field, click **Select an Option** and choose a field on the node object to filter by.
   - In Operator, click **equals** and select how to filter the field.
   - In Value field, enter a value to apply the filter.
   - To save your filter. click **Done**.

   Tip Use filter logic if you add more than 1 filter.

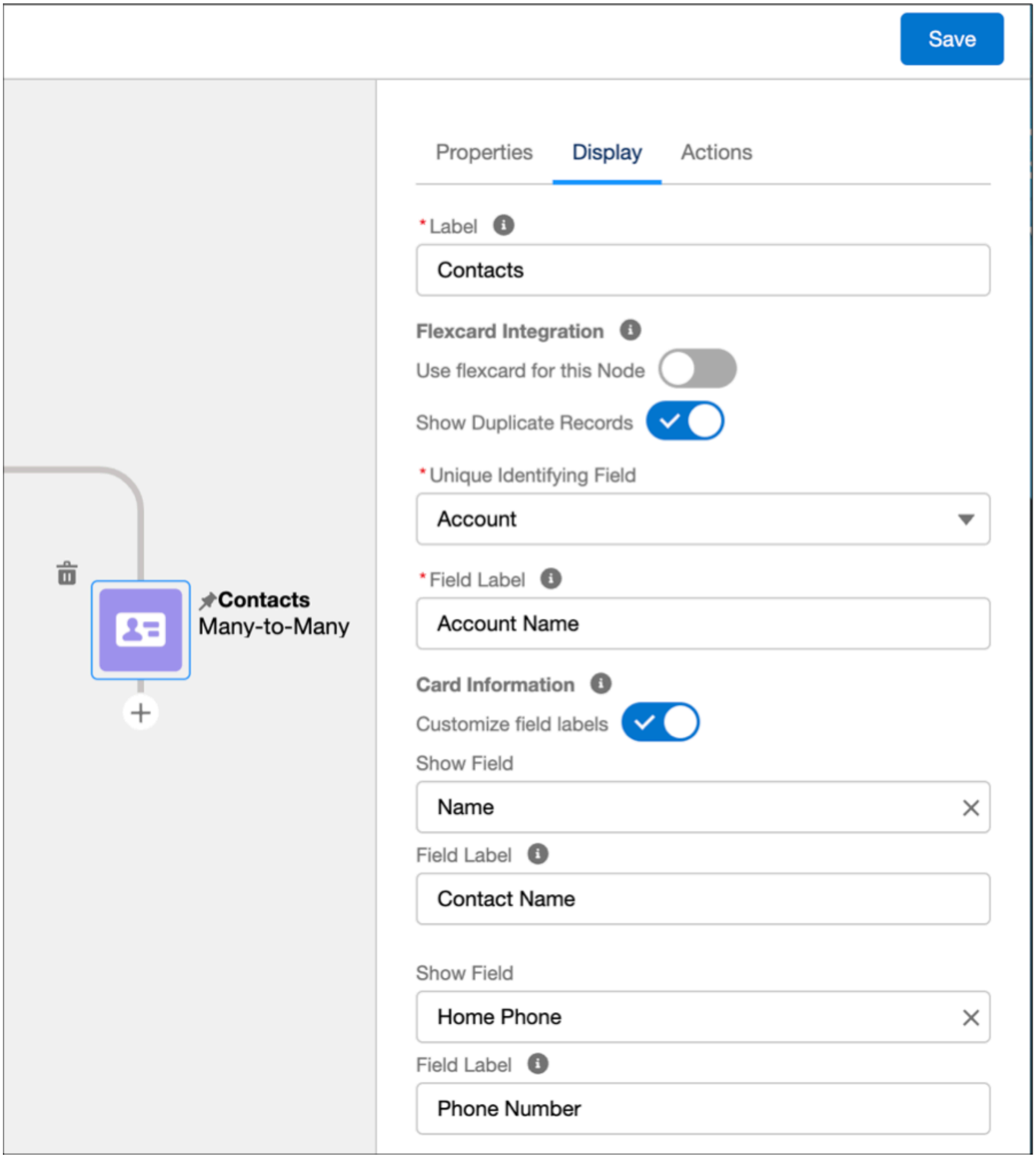


h. Select a Node Configuration.

8. To configure how the node appears on the record page, click the **Display** tab.
   a. Enter a label, for example, `Contacts`.
   b. If necessary, select **Use flexcard for this Node** and select a Flexcard.
      Use Flexcards to show your users contextual information in an at-a-glance format and give them access to relevant tasks for the data in an ARC graph. To use this feature, you need an Omnistudio license and build your Flexcards in Omnistudio.
   c. If necessary, select to **Show Duplicate Records**.
      Duplicate records only display for the many-to-many relationship type. When you select this option, duplicate records collapse into a single record card when the graph loads on a record page.
      For Unique Identifying Field, select an identifying field that's used to differentiate between junction objects. Then, enter a Field Label.
   d. Under Card Information, for Show Field, select the card fields to that you want to show.
   e. If necessary, select **Customize field labels** and update the field labels based on the needs of your users.
      Enter a label.
   f. To select and show up to 4 fields, click **Show Field**.

      Tip When you select many-to-many relationship type, the node object and junction object fields appear in the order that you select in the ARC graph builder.However, when you select many-to-many relationship type and show duplicate records, fields from the node object appear first, followed by the junction object, regardless of the order that you select in the graph builder.

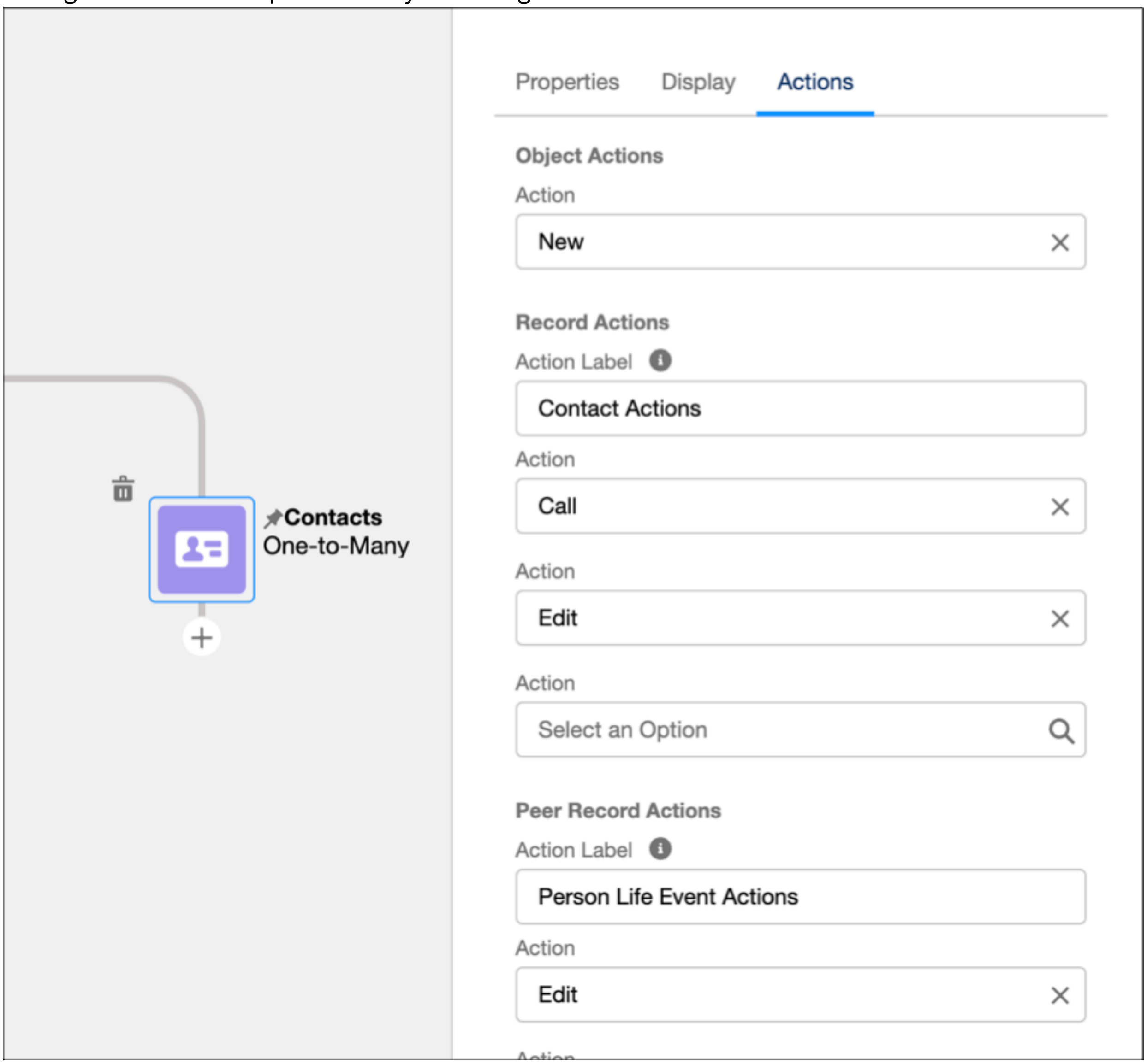
   g. Save your changes.



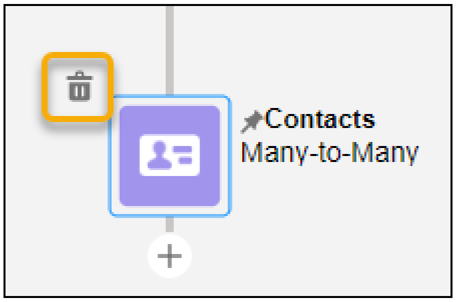
9. To configure the ability for a user to respond to new information, click the **Actions** tab.
   You can create and add custom buttons, and then add the buttons to your ARC object nodes. Show your users action labels that are most relevant to them by customizing the label. The label is visible when the user clicks the action menu on an ARC node. To use the default label, leave the field blank.
   a. In Object Actions, click **Select an Option** and select one object action.
   b. In Record Actions, enter a label for the record actions section on the ARC graph. The default label is Record Actions.
   c. In Record Actions, click **Select an Option** and select up to four record actions.
   d. In Junction Actions, enter a label for the junction actions section on the ARC graph. The default

label is Junction Actions.

e. In Junction Actions, click **Select an Option** and select up to 4 junction object actions. Junction actions are available for only the many-to Many relationship type.
f. In Peer Record Actions, enter a label for the peer record actions section on the ARC graph. The default label is Peer Record Actions.
g. In Peer Record Actions, click **Select an Item** and select up to 4 peer record actions.
h. To add an Omniscript action, click **Select an Option** in an Action menu, and select **Omniscript**. Configure the Omniscript and save your changes.



10. Save your changes.
11. Similarly, add more child nodes.
12. To delete a node, select a node on the graph and click the delete icon.



See Also

Salesforce Help: Create a Many-to-Many Relationship
Salesforce Help: Build Localized Component Labels and Attribute Values on Lightning Pages with Custom Labels
Consolidate Duplicate Records in an ARC Graph
Salesforce Help: Custom Labels
Metadata API Developer Guide: RelationshipGraphDefinition
Add Peer Objects to an ARC Relationship Graph
View Parent and Child Records in One Node on an ARC Relationship Graph
Salesforce Help: Custom Buttons and Links

Add Peer Objects to an ARC Relationship Graph

On one node on an ARC Relationship Graph you can show fields from two objects that have a one-to-one lookup relationship with each other.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To add peer objects on ARC graphs:	View permissions information.

There's a hard limit on the total number of custom fields allowed per object. If you have objects that have more than the maximum number of fields that an object can hold, and use peer objects with a one-to-one lookup relationship to hold those fields, you can show those fields in a single node on an ARC Relationship Graph.

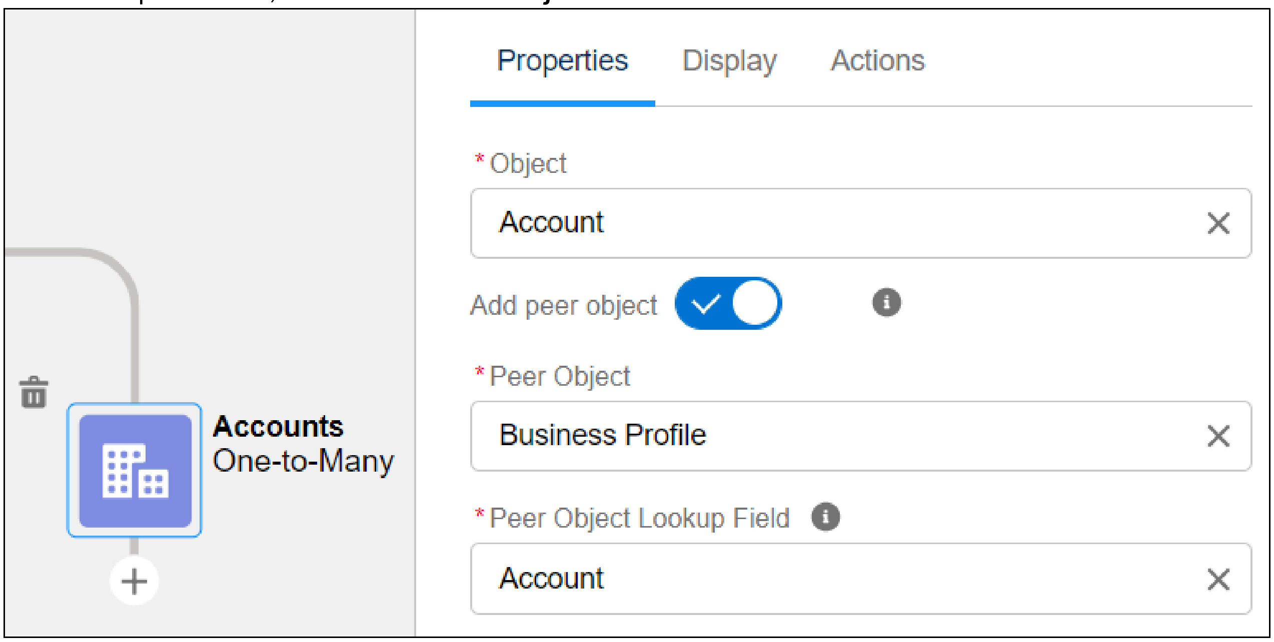
When **Show Peer Objects** is turned on, only records that have a one-to-one lookup relationship between the Node Object and the Peer Object are shown on the ARC Relationship Graph. If a record that matches the node object doesn't have a one-to-one lookup relationship to the Peer object, then it's not shown in the graph.

For example, you can configure a node where Asset object is the node object and Vehicle object is the peer object, and they share a one-to-one lookup relationship. If an asset record is not related to a vehicle record through a one-to-one lookup relationship, then the asset record doesn't display on the ARC

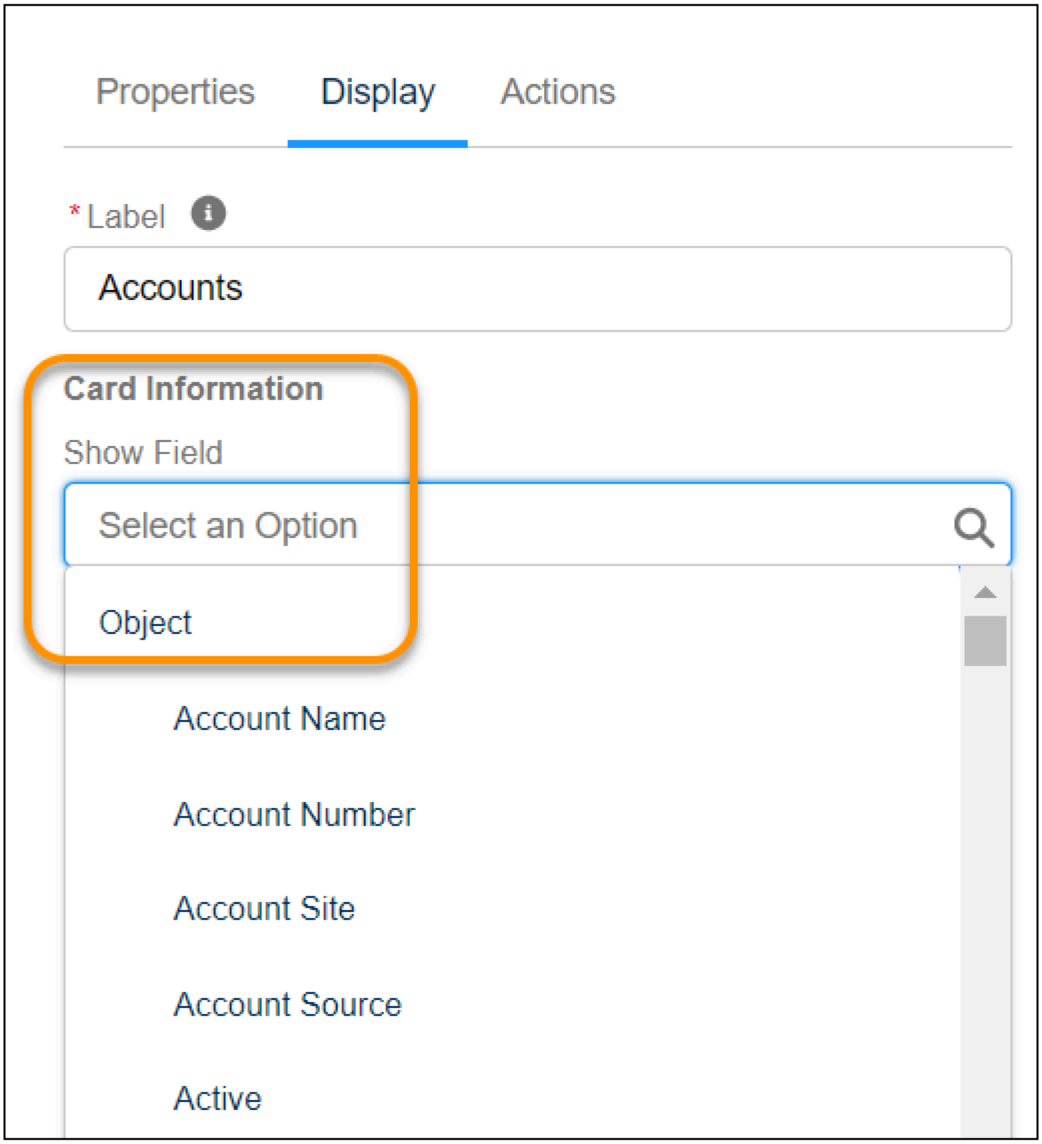
Relationship Graph.

To show records that match only the node object, create a new child node on the ARC Relationship Graph and don't turn on **Show Child Records**.

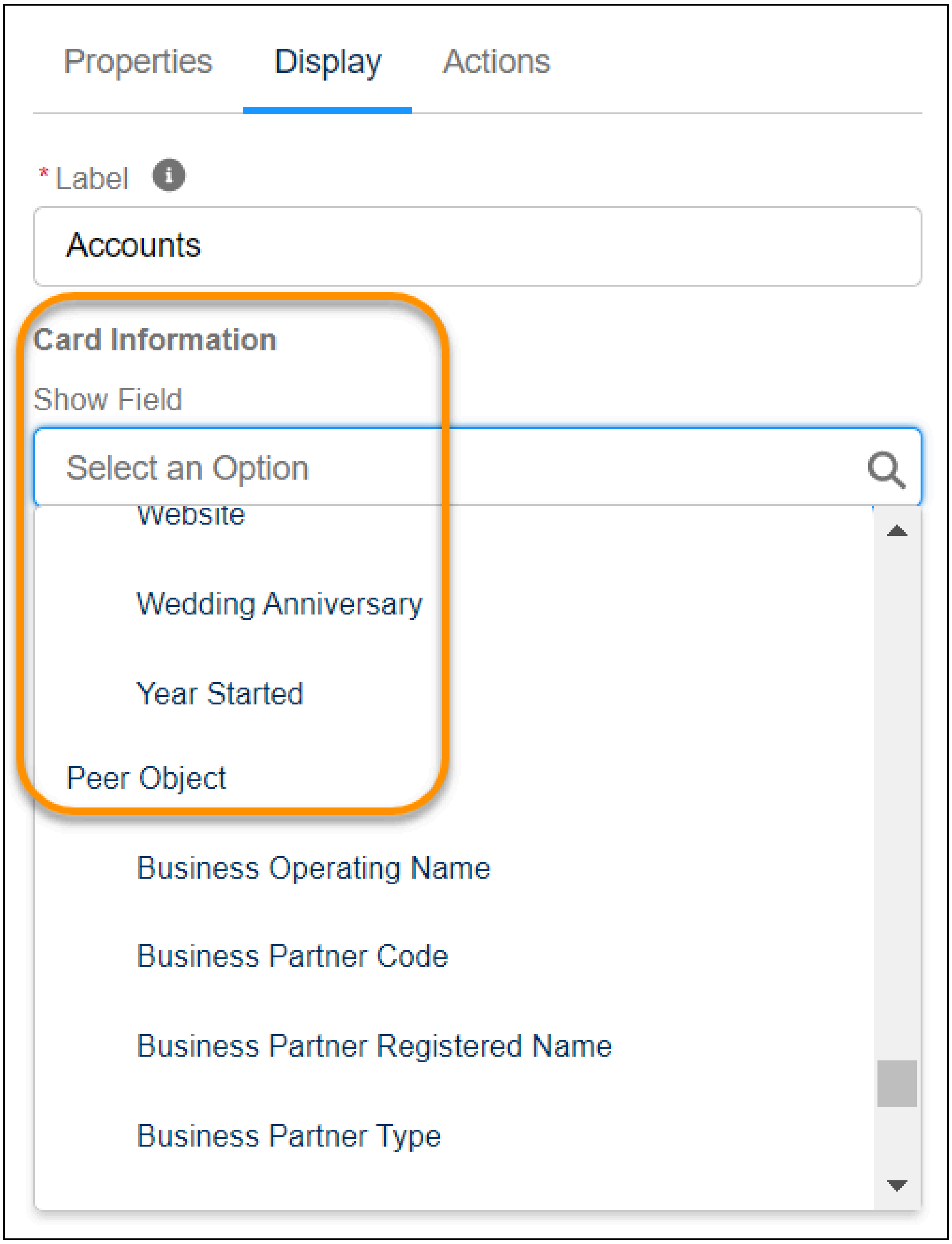
1. From Setup, in the Quick Find box, enter `Actionable Relationship Center`, and then select **Actionable Relationship Center**.
2. Click **New Relationship Graph** or edit an existing graph.
3. Create a new node or select an existing node.
4. On the Properties tab, turn on **Add Peer Object**.



5. In the **Peer Object** dropdown, select a peer object.
6. In the **Peer Object Lookup Field**, select a field from the peer object that points to the node object.
7. Configure the fields on the Properties tab.
8. Click the **Display** tab to select fields from the node object and the peer object to show on the ARC Relationship Graph.
   a. In Card Information, click **Select an Option** to select a field to show on the card. node object fields display first.



b. Scroll through the list to view and select Peer Object fields.



   c. To select and show up to four fields, click Add Field.

9. Click the **Actions** tab to add record actions from the node object and the peer object to show on the ARC Relationship Graph.
   a. In Peer Record Actions, click **Select an Item**, and select up to four peer record actions.
10. Save your changes.

See Also

Extend Salesforce with Clicks, Not Code: Object Relationships Overview

Extend Salesforce with Clicks, Not Code: Custom Fields Allowed Per Object

Configure Show Child Records on an ARC Relationship Graph

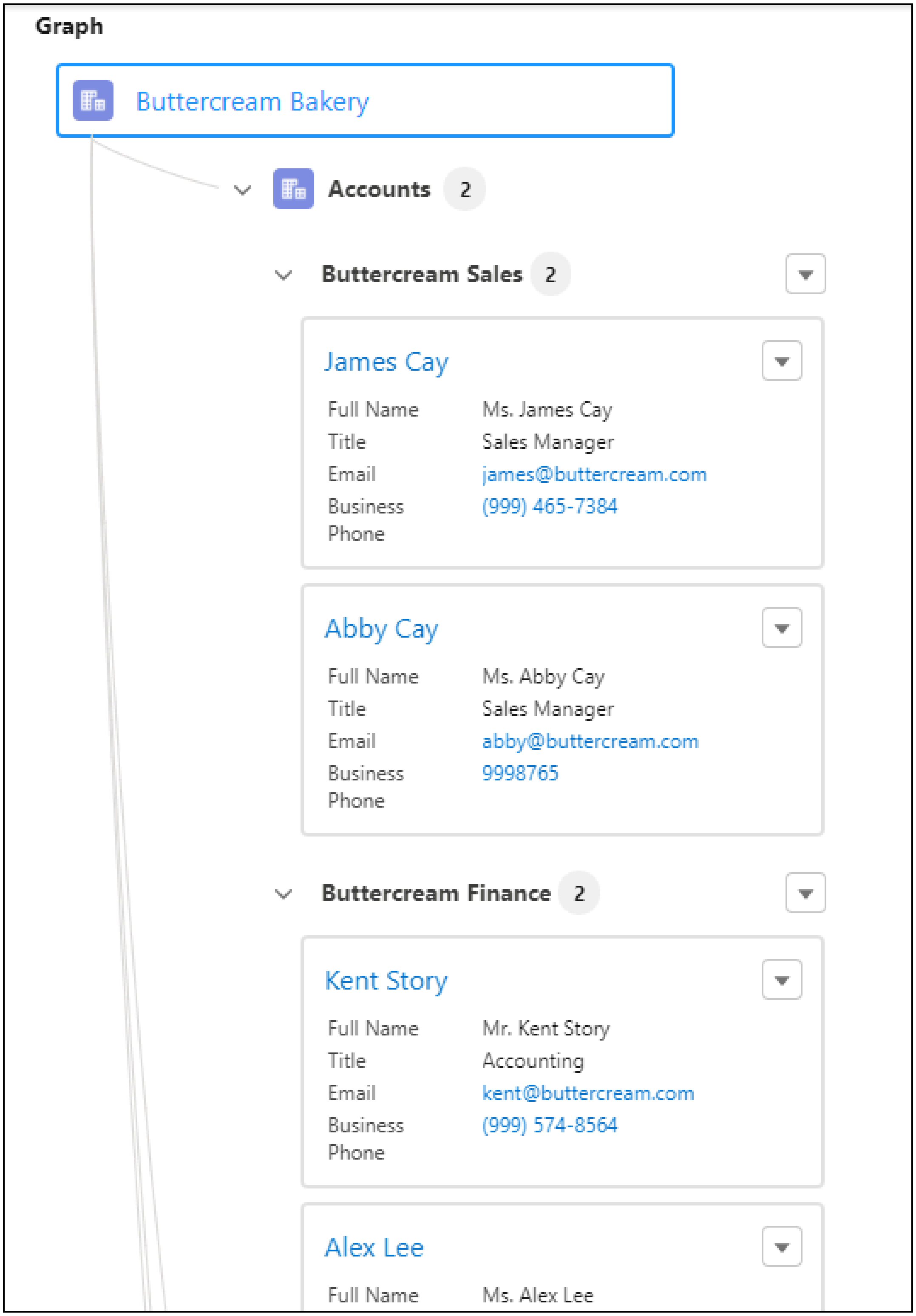
Show all child records with a parent record on an ARC Relationship Graph to let your users see relationship data in a single, unified view. When users view the ARC Relationship Graph on a record page, child records automatically show in the same node as the parent node, and users don't have to click a record to see the child records.

REQUIRED EDITIONS

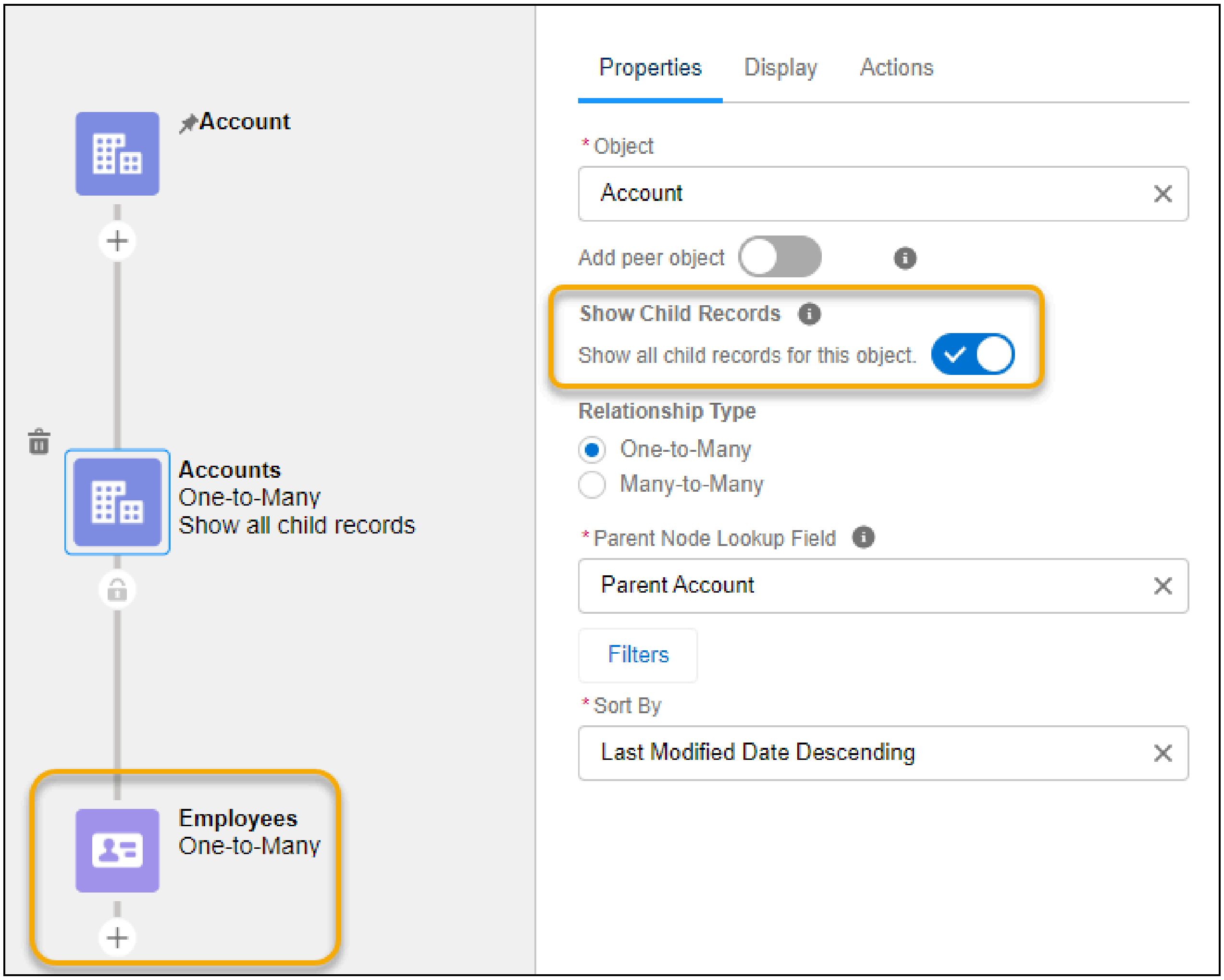
View supported product editions.

USER PERMISSIONS NEEDED	
To show child records on ARC graphs:	View permissions information.

Show child records saves users time. For example, if you have a parent account with multiple related accounts, and you need to show the employees of each related account, turn on **Show Child Records** setting in the Relationship Graph builder and add contact as the child node. When you view the ARC Relationship Graph on an account, all contacts are shown in the graph.



1. From Setup, in the Quick Find box, enter `Relationship Graphs`, and then select **Relationship Graphs**.
2. Click **New Relationship Graph** or edit an existing graph.
3. Create a new node or select an existing node.
4. On the Properties tab, select **Show Child Records**.
   When Show Child Records is turned on, a node can have only 1 child node.



5. Configure the node Properties, Display, and Actions tabs.
6. Click the child node below the parent node.
7. Configure the child node Properties, Display, and Actions tabs.
8. Save your changes.

See Also

[Create a Relationship Graph in Actionable Relationship Center]

Consolidate Duplicate Records in an ARC Graph

When you build a node using the many to many relationship type, one record can exist on multiple junction objects. Select to collapse the duplicate records into a single record card when the graph loads on a record page.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To consolidate duplicate records in ARC graphs:	View permissions information.

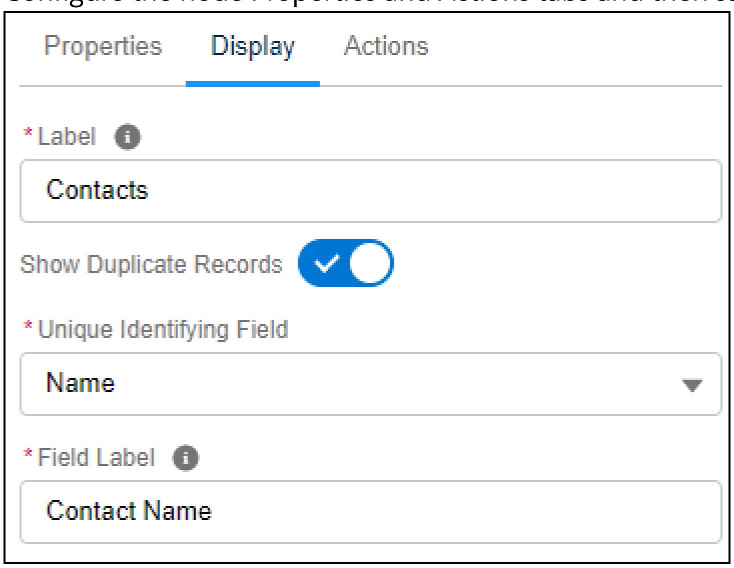
There is a limit of 5 junction records per record when duplicate record is enabled.

If duplicate records is disabled, when the graph loads duplicate records are displayed as separate cards.

1. From Setup, in the Quick Find box, enter `Relationship Graphs`, and then select **Relationship Graphs**.
2. Click **New Relationship Graph** or edit an existing graph.

   Note On the Properties tab, Relationship Type Many-to-Many must be enabled to use Show Duplicate Records.

3. On the Display tab, select **Show Duplicate Records**.
   a. Below Unique Identifying Field, click **Select an Option** to select an identifying field that will be used to differentiate between junction objects records.
   In the Unique Identifying Field, the vales are from the Junction Object.
4. Configure the node Properties and Actions tabs and then save your graph.



Add an Omniscript to an ARC Node

An Omniscript gives your users a guided path for completing a business process and serves as a configurable way of creating a seamless experience for your users. To build your Omniscripts, go to Omnistudio. Then in an ARC graph, to give your users quick access to processes they complete often, add the Omniscript to a node.

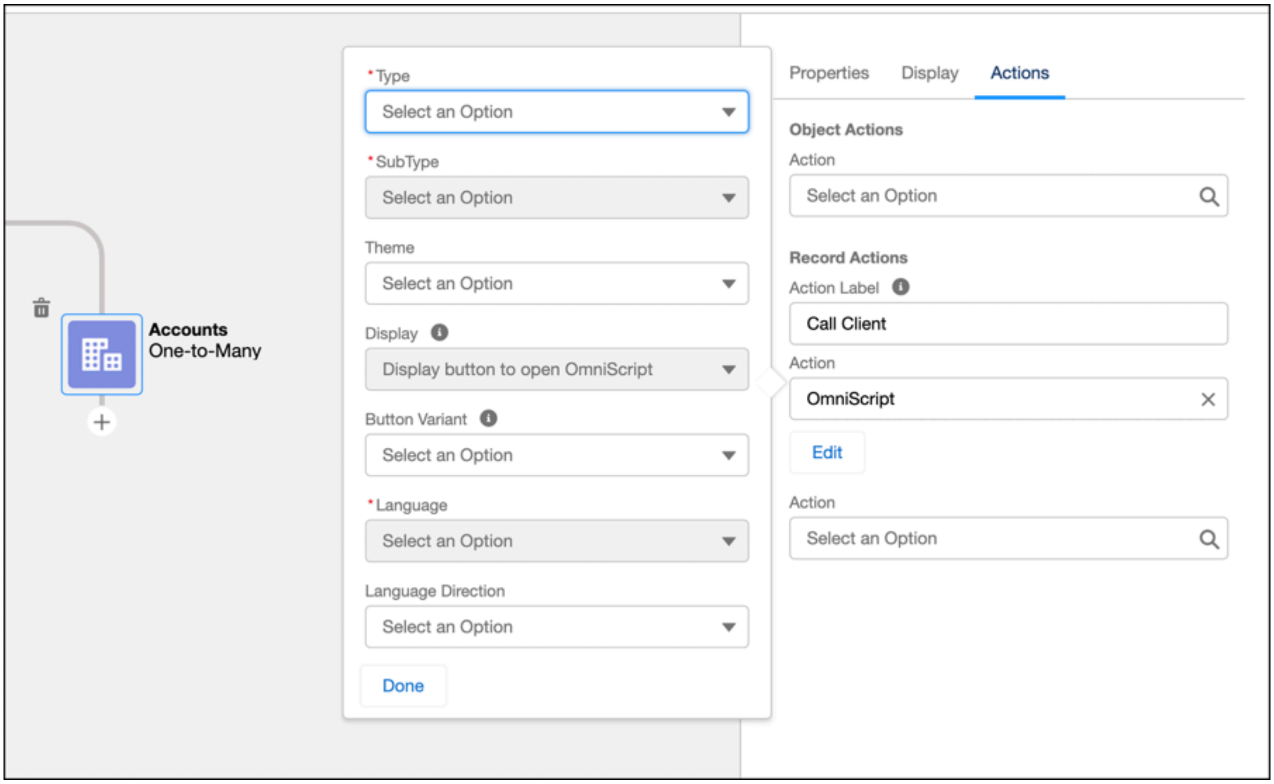
REQUIRED EDITIONS
View supported product editions.

USER PERMISSIONS NEEDED	
To add an Omniscript to an ARC node:	View permissions information. AND Omnistudio Admin permission set OR Omnistudio User permission set

Note To use this feature, you must have an Omnistudio license, build Flexcards in Omnistudio, and enable Omnistudio Metadata in Omnistudio Settings in Setup.

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 node or select an existing node.
4. Click the **Actions** tab.
5. Click **Select an Option** and select Omniscript.
6. Configure the Omniscript.
   a. Select Type.
   b. Select Sub Type.
   c. Select Language.
   d. Select Theme.
   e. Select Display.
      Display button to open Omniscript is the only support display option in ARC.
   f. Select Button Variant.
   g. Select Language Direction.
   h. Click Done.
7. Save the graph.

   Note When a user clicks an Omniscript on an ARC graph, the Omniscript shows in a new window. The appearance of the Omniscript on an ARC graph is based on how it was configured in Omnistudio.



See Also

Salesforce Help: OmniScripts

Create a Relationship Graph in Actionable Relationship Center

Show Fields from Multiple Objects on One ARC Node

On an ARC Graph node, show fields from objects that share a lookup relationship to the node object. Find the objects that have a lookup relationship to the node object on the Display tab in the show field picklist.

REQUIRED EDITIONS

View supported product editions.

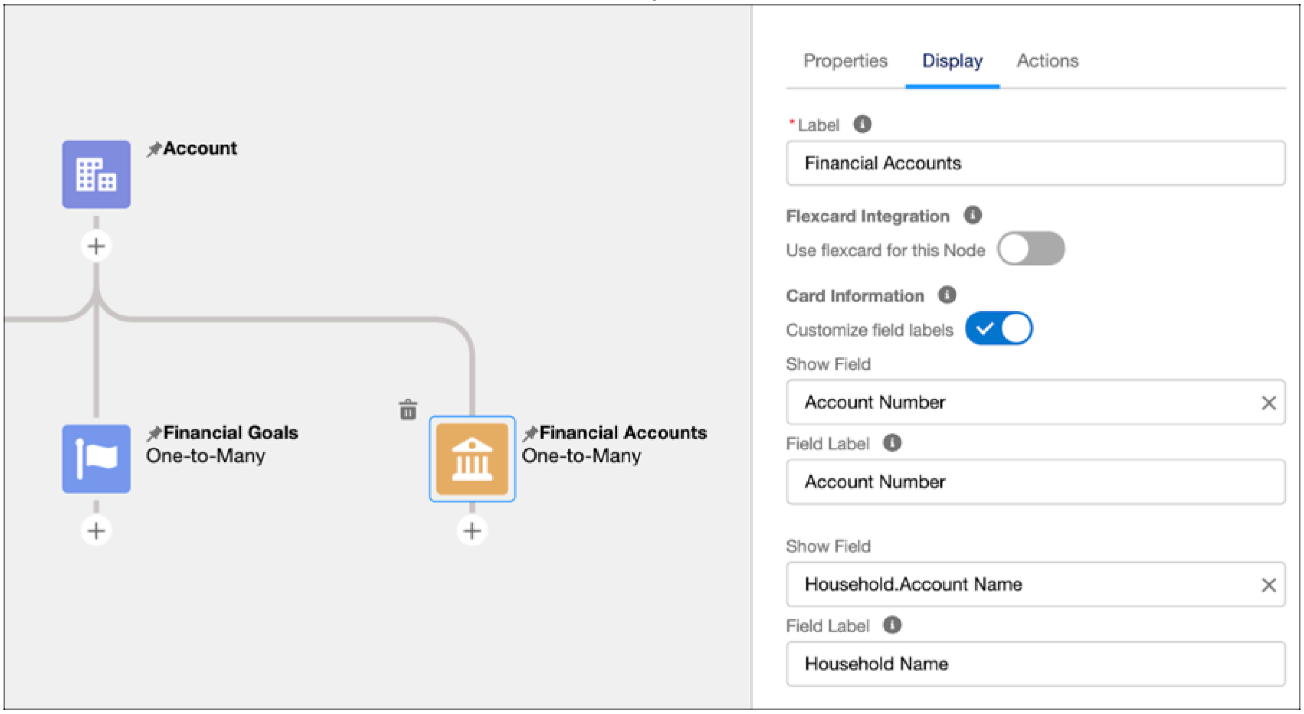
USER PERMISSIONS NEEDED	
To configure ARC graphs:	View permissions information.

Showing fields from multiple objects on one node gives your users more information about their clients in one, unified view.

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 node or select an existing node.

4. Click the **Display** tab.
   a. Under Card Information, for Show Field, select a related object.
5. Configure the ARC graph and save your changes.

Example In Financial Services, you can create an ARC graph to show your users important details about a person, using the person account object. Then you can add a node that shows the financial accounts for the person. This graph can help your users know to which household each financial account is related. On the Financial Account node, select Household object, and then select Account Name.



See Also

Salesforce Help: Object Relationships Overview

Create a Relationship Graph in Actionable Relationship Center

Customize ARC Nodes using Flexcards

Use Flexcards to show your users at-a-glance contextual information and provide them with access to relevant tasks for the data in an ARC graph. In Omnistudio, the drag-and-drop elements let you build Flexcards quickly to show your users contextual information in an at-a-glance format and provide them with access to relevant tasks for the data in an ARC graph.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To customize ARC nodes using Flexcards:	View permissions information. AND Omnistudio Admin permission set OR Omnistudio User permission set

Note To use this feature, you must have an Omnistudio license and build Flexcards in Omnistudio.When building Flexcards in Omnistudio, the recommended maximum size is 22.2 rem (355 pixels) so the card details show on the ARC graph.

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 node or select an existing node.
4. Click the **Display** tab.
5. Select **Use Flexcard** to show the node in a Flexcard.
6. (Optional) In **Exposed Attributes** enter a configurable public property as JSON.
   For example, you can set a limit on the number of Account records shown on your Flexcard. If the variable is `AccountRecordLimit`, to limit the records shown to 5, enter `{"AccountRecordLimit": 5}`. For multiple properties, separate key/value pairs with a comma, such as `{"AccountRecordLimit": 5, "Greeting": "Hello"}`.

See Also

Salesforce Help: FlexCards
Create a Relationship Graph in Actionable Relationship Center
Salesforce Help: Create a Public Property for a FlexCard LWC in the FlexCard Designer

Customize Actionable Relationship Center Graph Views on a Record

Customize graphs on records to show only the records you need. Change which objects appear in the graph, apply filters to show records based on certain criteria, sort records, and save custom views with applied filters.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To customize ARC graphs on records:	View permissions information.

Note To customize ARC graph views on a record, you must enable Customize Views when you create the graph.

1. Open the relationship graph on a record.
2. To apply an object-level filter, click for the top-level node and deselect objects to remove them from the graph.
3. To apply a record-level filter or sort the records, click for a node in the graph, such as Cases.
4. For Sort By, select a method to sort the records.
5. Click **Add Filter**.
6. Select the entity type that the filter applies to, such as **Object**, **Junction**, or **Peer**.
7. In Field, search for and select a field to filter by, such as **Priority**.
8. Select an operator, such as **equals**.
9. Enter a value, such as `High`.
10. To apply the filter, save your work.
11. To save the current view, click , and then select **Save View As**.
12. Enter a name for the view and then click **Save View**.
    You can save up to 10 views of a graph.
13. To change views, click the graph name, and then select the desired view.
14. To save changes to the view, click , and then select **Update View**.
15. To delete a view, click , and then select **Delete View**.

Customize Record Pages Using ARC Components

Use the Lightning App Builder to add, remove, or reorder ARC components on a record page to give users a customized view of relationship graphs.

REQUIRED EDITIONS

View supported product editions.

Remember to create the graph in the Actionable Relationship Center in Setup. Then, ensure that the graph has the same root node as the object record page.

Add ARC Relationship Graph Component to Record Pages
Add a relationship graphs to record pages to show relationships between records.

Add ARC Record Details Component to Record Pages
Show record details of a selected node on an ARC relationship graph.

Add ARC Highlights Panel Component to Record Pages
Show a header that contains selected node actions and a name.

See Also

Salesforce Help: Create and Configure Lightning Experience Record Pages

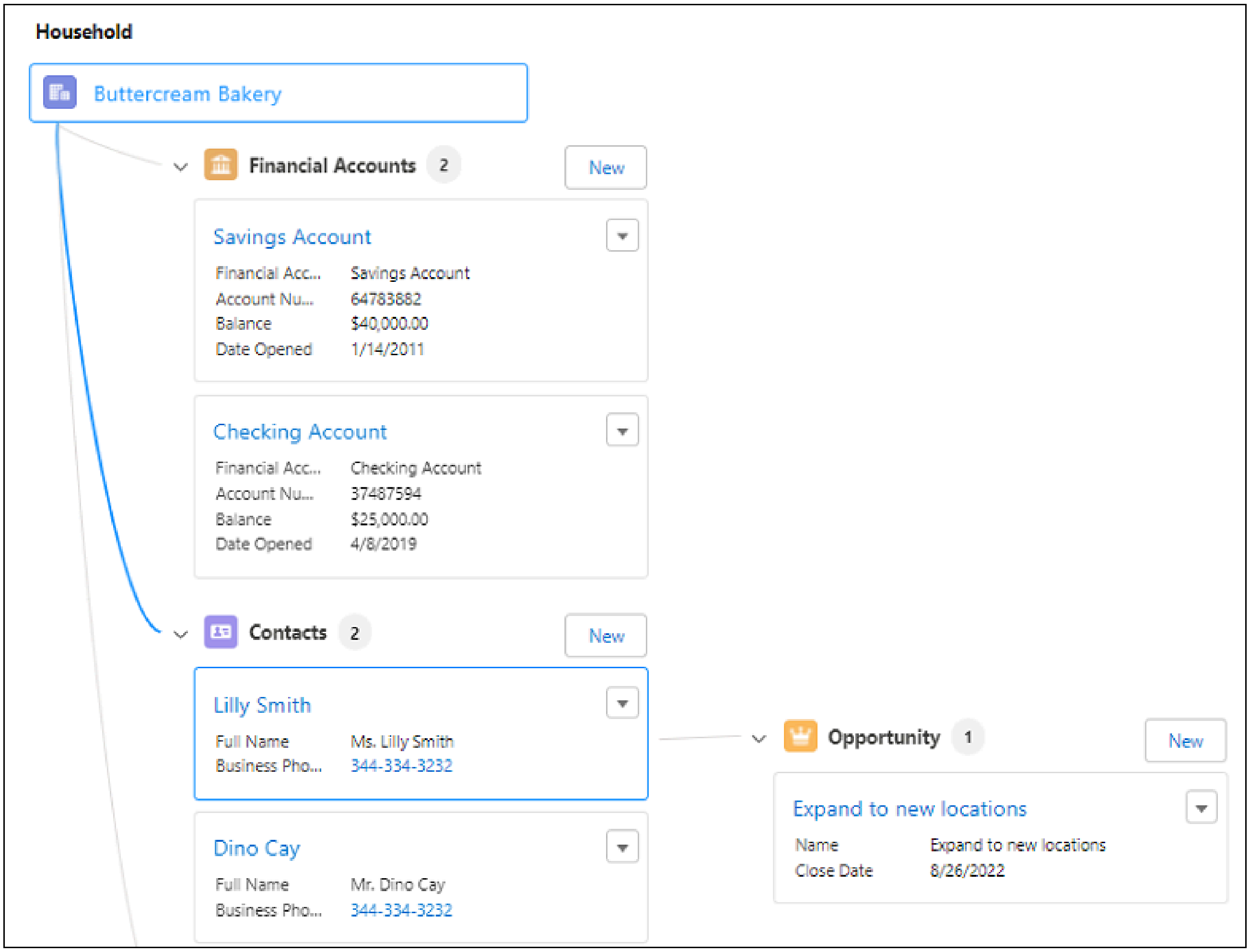
Add ARC Relationship Graph Component to Record Pages

Add a relationship graphs to record pages to show relationships between records.

REQUIRED EDITIONS
View supported product editions.

USER PERMISSIONS NEEDED	
To add the ARC Relationship Graph component to a record page:	View permissions information. AND Customize Application user permission

1. In Lighting App Builder, on the record page that you're editing, add a Tabs component to the page. A default set of tabs is added.
2. Click **Add Tab** in the Tabs component properties to add a new tab.
3. Click the new tab and customize the Tab Label. Then click **Done**.
4. Select the new tab on the canvas to add ARC components.
   a. Drag **ARC Relationship Graph** component from the Components panel to the new tab in the Lightning page.
5. Configure the graph in the properties pane.
   a. Enter a Label.
   b. Select a Relationship Graph with the same root node as the object record page.
   c. Select Component Visibility.
6. Save your changes.



See Also

Salesforce Help: Add and Customize Tabs on Lightning Pages Using the Lightning App Builder

Salesforce Help: Dynamic Lightning Pages

Add ARC Record Details Component to Record Pages

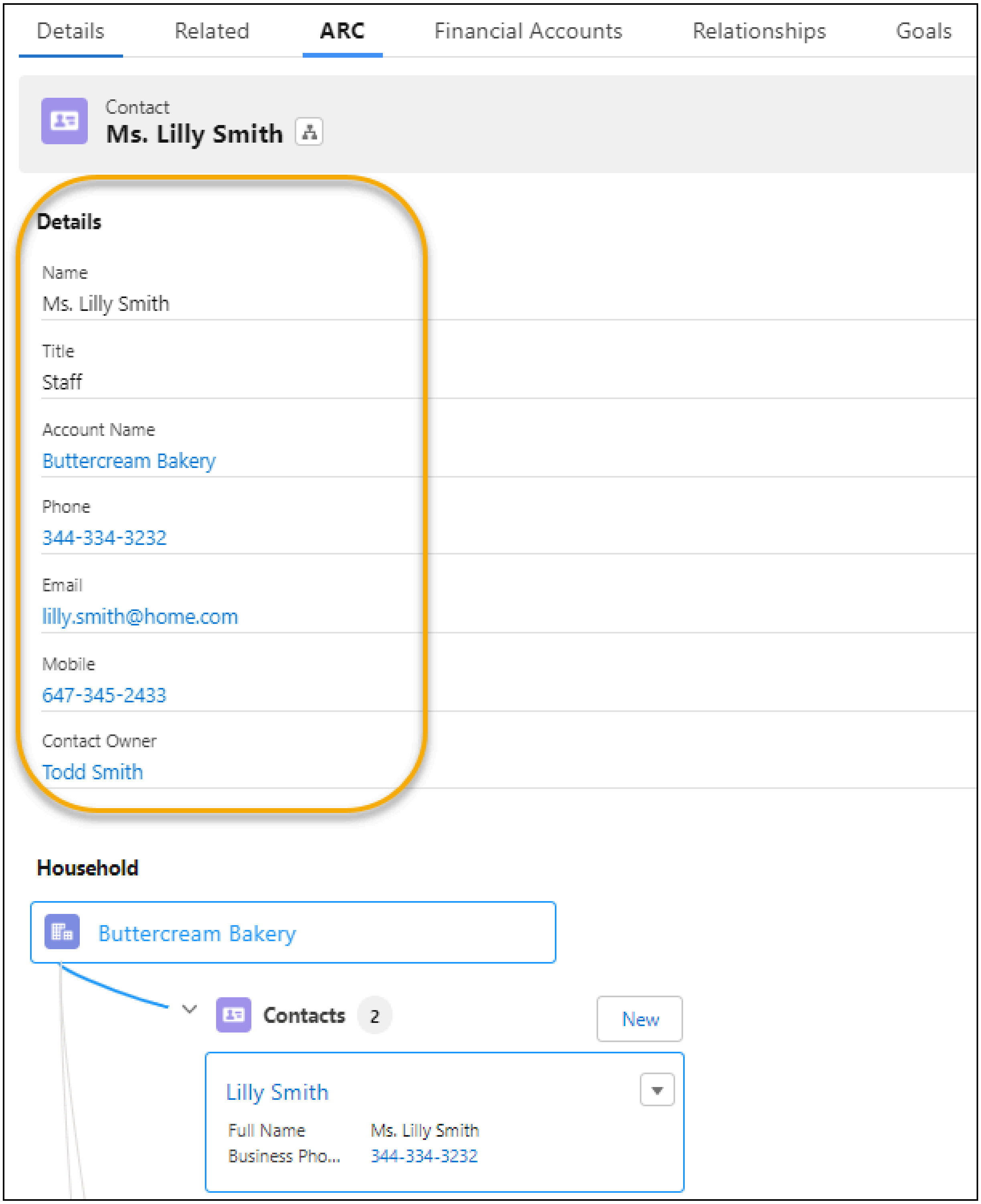
Show record details of a selected node on an ARC relationship graph.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To add the ARC Record Details component to a record page:	View permissions information. AND Customize Application user permission

1. In the Lighting App Builder, on the record page that you're editing, select the ARC tab on the canvas.
2. Drag the **ARC Details Panel** component from the Components panel to the ARC tab.
3. Save your changes.



Add ARC Highlights Panel Component to Record Pages

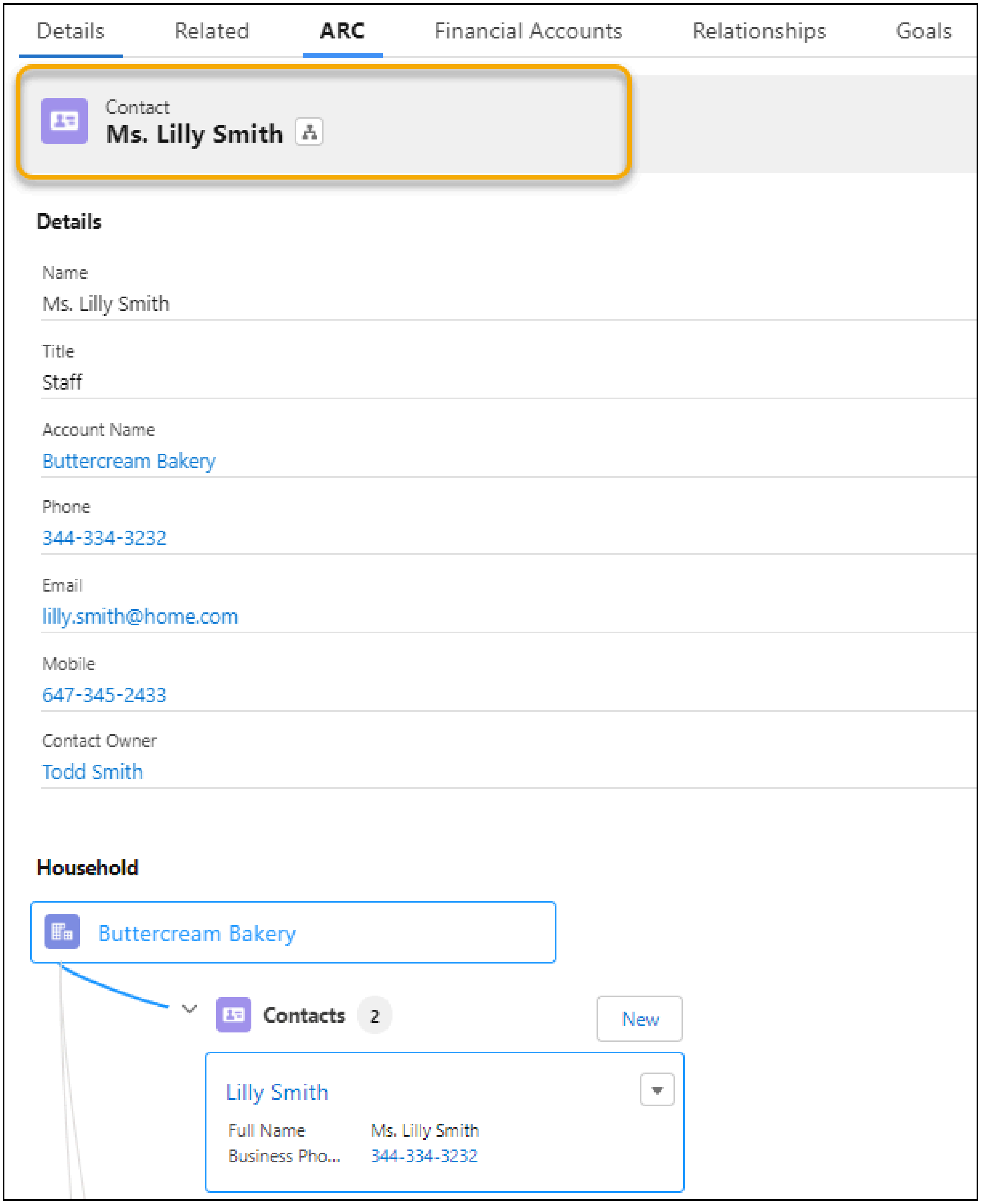
Show a header that contains selected node actions and a name.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To add the ARC Highlights Panel component to a record page:	View permissions information. AND Customize Application user permission

1. In Lighting App Builder, on the record page that you're editing, select the ARC tab on the canvas.
2. Drag the **ARC Highlights Panel** component from the Components panel to the ARC tab.
3. Save your changes.



Customize Experience Cloud Templates Using ARC Components

Add ARC components to Experience Cloud pages so your partner users can view ARC Relationship

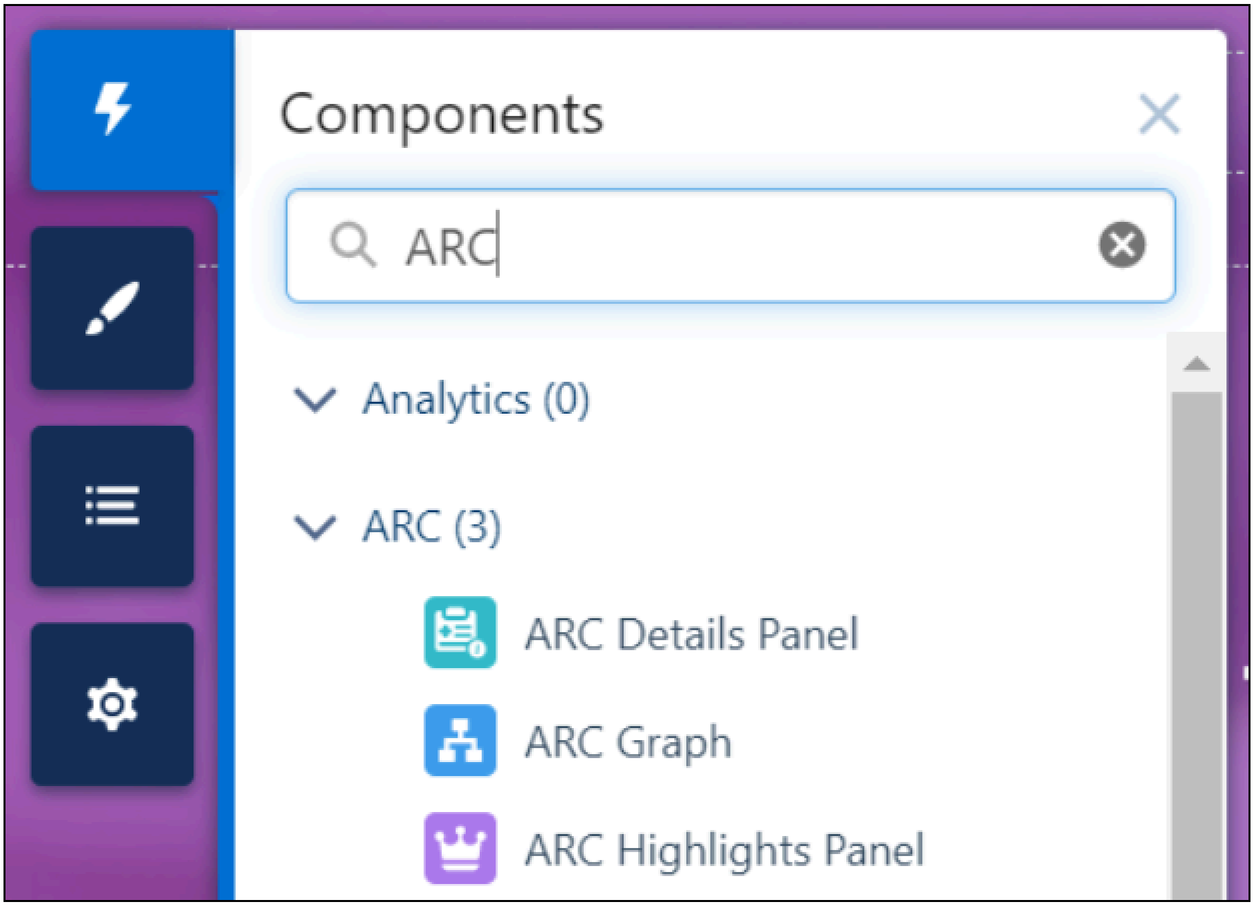
Graphs.

REQUIRED EDITIONS

View supported product editions.

Note Before setting up ARC in Experience Cloud, complete the setup steps for Experience Cloud.

In Experience Cloud, ARC components and side panel components are view only, with the exception that users can click a record to navigate to the record page. Actions on cards are not shown.



Assign ARC Experience Cloud Permissions to Users
Give your partner users access to ARC Relationship Graph, ARC Highlights Panel, and ARC Record Details Lightning components in Experience Cloud.

Add ARC Components to Experience Cloud Sites
Customize Experience Cloud site with ARC components.

See Also

Salesforce Help: Financial Services Cloud Experience Cloud Sites
Financial Services Cloud Experience Cloud Sites
Salesforce Help: Customize Sites with Experience Builder

Assign ARC Experience Cloud Permissions to Users

Give your partner users access to ARC Relationship Graph, ARC Highlights Panel, and ARC Record Details Lightning components in Experience Cloud.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To create permission sets:	Manage Profiles and Permission Sets user permission
To assign permission sets:	Assign Permission Sets user permission

In Experience Cloud, ARC components and side panel components are view only, with the exception that users can click a record to navigate to the record page. Actions on cards are not shown.

Note Partner 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. Check if your product provides a permission set that includes ARC access in Experience Cloud. See Actionable Relationship Center Editions and Permissions.

1. Create a permission set with the ARC Experience Cloud permissions enabled.
   a. From Setup, in the Quick Find box, enter `Permission Sets`, and then click **Permission Sets**.
   b. Click **Clone** next to the Partner Community Login OR Partner Community permission sets provided by your product.
   c. Enter a label for your permission set, such as `ARC Experience Cloud for Partner Users`.
   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 Access Actionable Relationship Center for partner users 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.
   c. Click **Manage Assignments**, and then click **Add Assignments**.
   d. Select the checkbox for each user who will view ARC graphs in Experience Cloud, and then click **Assign**.

See Also

Financial Services Cloud Permission Set Licenses
Create an Actionable Relationship Center Permission Set for Financial Service Cloud
Salesforce Help: Licenses Overview

Add ARC Components to Experience Cloud Sites

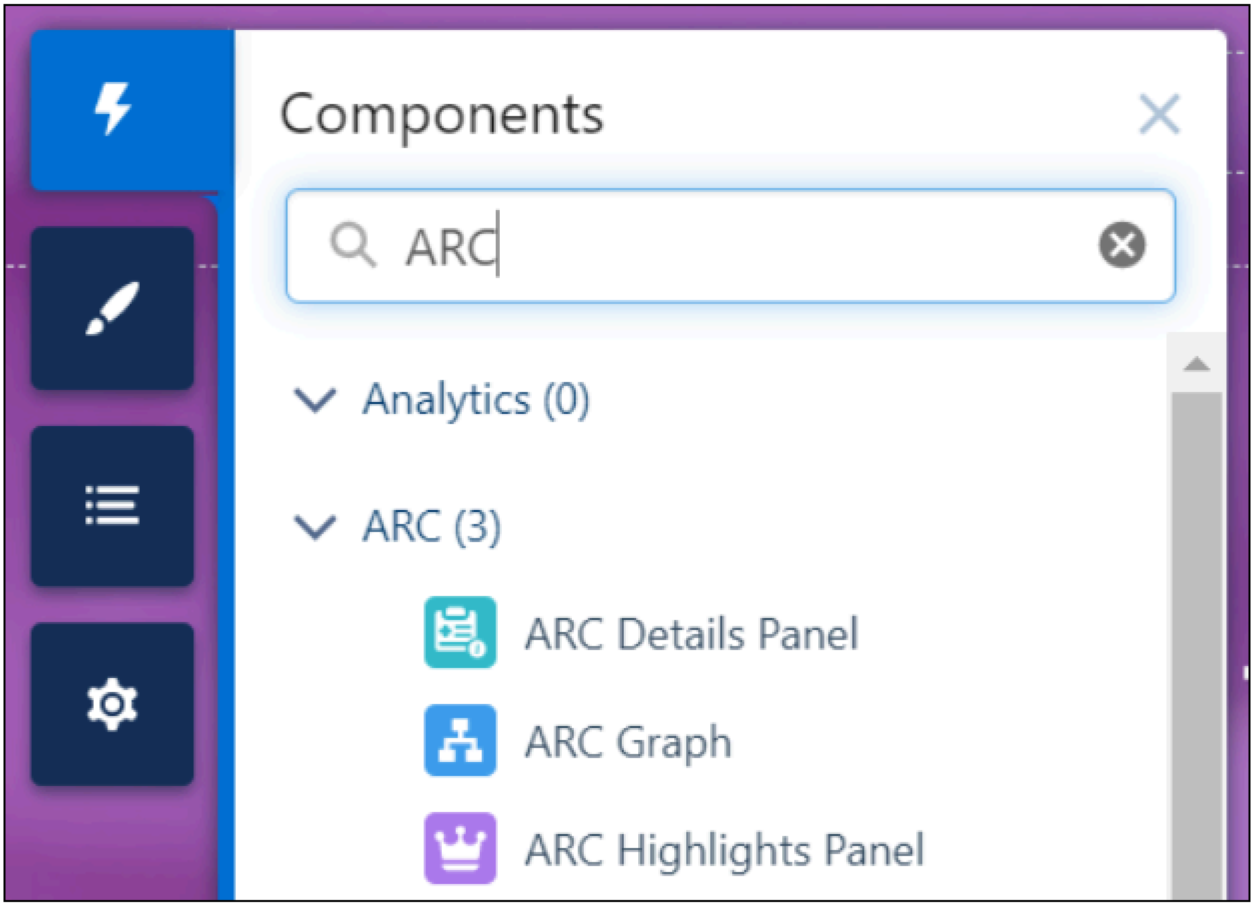
Customize Experience Cloud site with ARC components.

REQUIRED EDITIONS

View supported product editions.

USER PERMISSIONS NEEDED	
To customize an Experience Cloud site:	View permissions information. AND Be a member of the site AND Create and Set Up Experiences user permission

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.
2. Click **Builder** next to the Experience Cloud site that you want to customize.
3. Click Components, and enter `ARC`.
4. Drag the ARC components onto the canvas.



See Also

[Customize Record Pages Using ARC Components]

Explore an ARC Relationship Graph

View and explore relationships among records on an ARC graph.

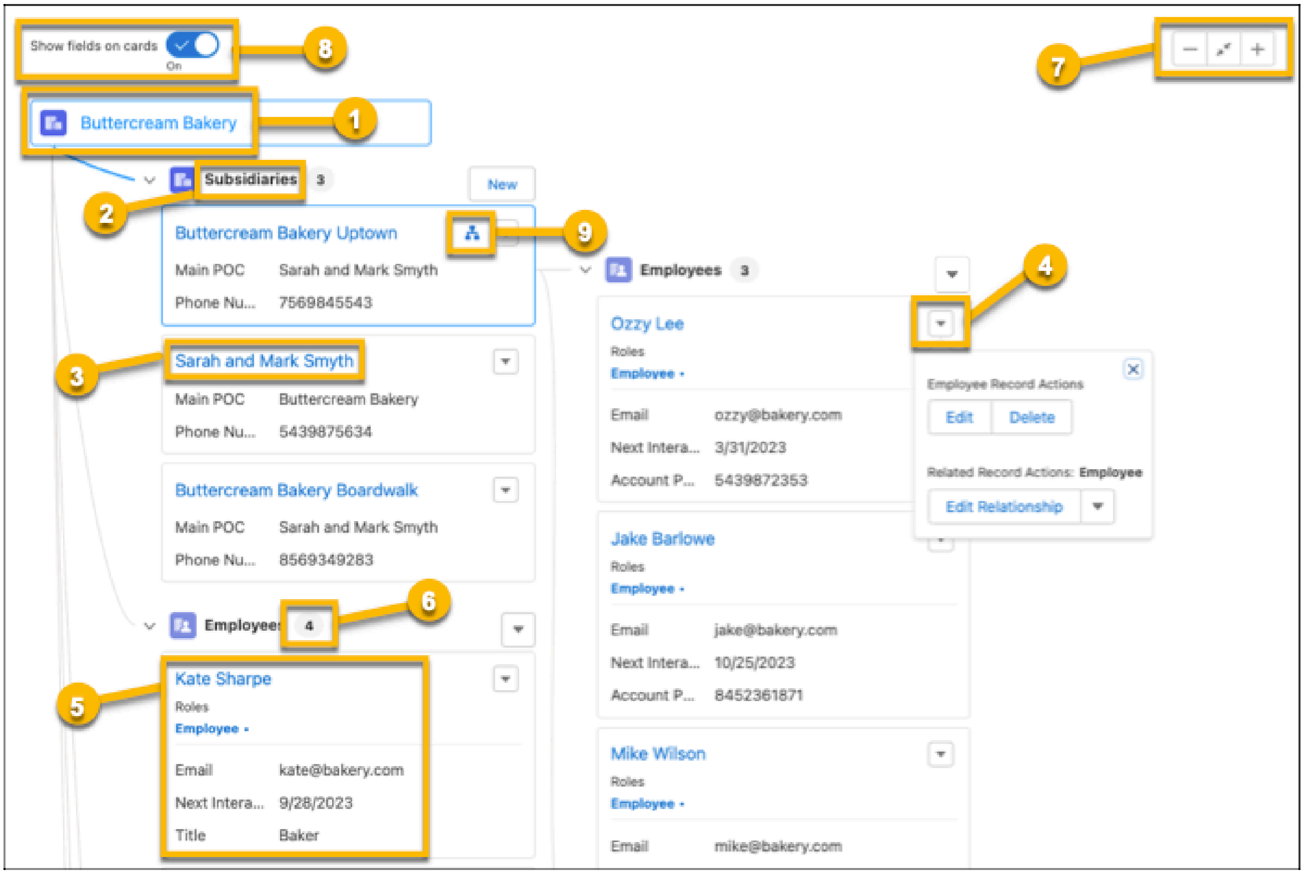
REQUIRED EDITIONS

View supported product editions.

Navigate to a record page and click the ARC graph tab.

- Root record name (1)
- Node name (2)
- Child record name (3)
- Node actions (4)
- Node information (5)
- Number of child records (6)
- Zoom In, Zoom Out, Reset Graph, and Center Graph (7)

- Show or hide fields on cards (8)
- Hierarchy icon shows that the card has child records (9)



Zoom in and Zoom out buttons let you focus on the most relevant client information. Zoom in to a maximum of 160% and zoom out to a maximum is 40%. ARC Zoom in and zoom out is independent of browser zoom.

Reset Zoom and Center Graph buttons return the graph to its original zoom and position.

The **Show fields on cards** toggle hides fields on ARC graph cards so that cards show only the record name.

The hierarchy icon shows on ARC graph cards anytime a card has child records associated with it.

View Parent and Child Records in One Node on an ARC Relationship Graph
When Show Child Records is enabled for a node, view the parent object record and its child records in a single, unified view.

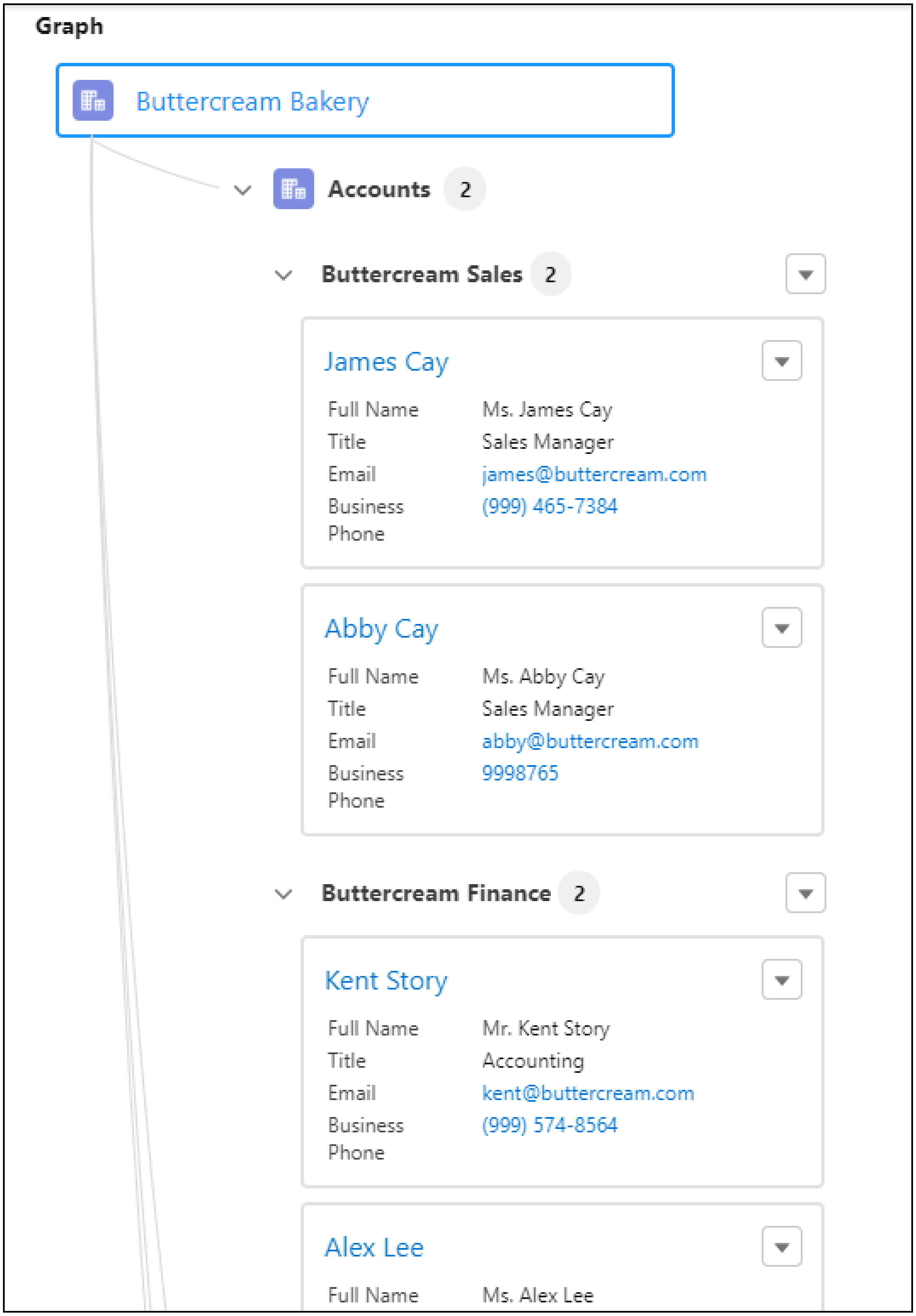
View Parent and Child Records in One Node on an ARC Relationship Graph

When Show Child Records is enabled for a node, view the parent object record and its child records in a single, unified view.

REQUIRED EDITIONS
View supported product editions.

USER PERMISSIONS NEEDED	
To view parent and child records on ARC graphs:	View permissions information.

1. Navigate to a record page and click the ARC Graph tab.
2. When **Show Child Records** is enabled, child records show in the same node as the parent node.
3. If there are more than five child records, click **Show More** to see more records.
4. To show record details, click a record name on a node.



See Also

Configure Show Child Records on an ARC Relationship Graph

Actionable Relationship Center Considerations and Limitations

Here are some things to keep in mind when you implement Actionable Relationship Center (ARC).

REQUIRED EDITIONS

View supported product editions.

Note Summer '22 offered a new version of Actionable Relationship Center. For considerations and limitations related to this new version, you're in the right place.

- 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.
- There's a limit of 5 junction records per record when duplicate record is enabled.
- You can create a maximum of 10 child nodes per parent node.
- You can't delete a relationship graph that is referenced on a record page.
- On the Actions tab, you can add 1 object action per object. There's no limit on the number of record or junction actions.
- External objects aren't supported in ARC Relationship Graphs.
- You can add ARC Relationship Graph, ARC Details Panel, and ARC Highlights Panel components to Experience Cloud Templates.
- To add the ARC Relationship Graph, ARC Details Panel, ARC Highlights Panel, ARC Einstein Relationship Insights, and ARC Financial Services Cloud components to record pages, you must use Lightning App Builder. The components aren't available in Aura, Visual Forces Pages, and Lightning Web Components.
- When you click and complete a standard record action on an ARC graph, such as edit or delete a record, the ARC graph refreshes. If you create a custom action and add it to an ARC graph, when you click and complete the custom action on an ARC graph, the ARC graph doesn't refresh. To see the result of the custom action, refresh the page.
- On the Properties tab of an ARC node, if you create a filter with Field type Status, the Value must be the API name. To find API name in Setup, go to Object Manager, select the object, click Fields & Relationships, and then click the field label. Find the API name in Values.
- On the Properties tab of an ARC node, if you create a filter with Field type Record Type, the Value must be the Record Type Name. To find the Record Type Name in Setup, go to Object Manager, select the object, click Record Types, then click the record type label to find the Record Type Name field.
- When you package an ARC graph definition, if the ARC graph contains OmniScripts and FlexCards, they won't be included in the package. When you install a package with FlexCards and OmniScripts, the package install fails. To install a packaged ARC graph definition that includes FlexCards and OmniScripts, first, import your FlexCards and OmniScripts into Salesforce using Vlocity Data Pack. Then install your packaged ARC graph definition.
- The ARC Highlights panel component doesn't support dynamic actions enabled in Lightning App Builder. The actions supported in the ARC Highlights Panel component must be configured in the page layout.
- ARC is supported only on desktop.

- Actions on record pages behave as described in Actions in Lightning Experience.

Note ARC keyboard navigation is for horizontal hierarchy graph type. For vertical hierarchy graph type, use up and down arrow keys instead of left and right, and use left and right arrow keys instead of up and down.

Keyboard Navigation for ARC

UI Element/keyboard keys	Available Actions
Control Panel Container	• Press Tab, Enter, or Space to enter a container, where the focus is on the field's toggle. • Press the Down arrow key to focus on the root record.
Control Panel Buttons	• Press Esc to focus on the control panel container. • Press Enter to execute the button action. • Press the Left or Right arrow key or Tab+Shift+Tab to traverse buttons.
Root	• Press the Right arrow to go to the first relationship root container. • Press the Up arrow to go to the control panel.
Chevron icon	• Press Enter or Space to expand or collapse the next-level records (containers). • Press Tab to go to the action button. • Press the Down or Up arrow to traverse the records. • Press Esc to focus on the relationship container.
Relationship Action Button	• Press Enter to execute the button. • Press Tab or the Down arrow key to go to the first record in the container. • Press Shift+Tab to focus on the chevron icon. • Press Esc to focus on the relationship container.
Relationship Container	• Press the Up or Down arrow keys to traverse sibling relationship containers (containers in the same level)

UI Element/keyboard keys	Available Actions
	• Press Tab, Enter, or Space to focus on the container, where the focus is on the chevron icon. • Press the Left arrow key to focus on the parent node.
Record	• Press Enter to fetch child relationships, where the focus is on the first relationship container. • Press Esc to return to the relationship container. • Press the Up or Down arrow key to traverse sibling record name. • Press Tab to enter a tile and focus on the record name. Press Tab again to go to the available record actions. Press Tab a final time to go to the next record's name. • Press Shift+Tab to go to the previous element.
Show More Button	• Press Enter to execute the button, where the focus goes to the previous record before the button was clicked. • Press Esc to focus on the relationship container.