Financial Services Cloud Quick Start

Salesforce, Summer ’18

@salesforcedocs
Last updated: July 12, 2018

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GET READY TO USE FINANCIAL SERVICES CLOUD

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

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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

Check Whether You're Set Up for Financial Services Cloud

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

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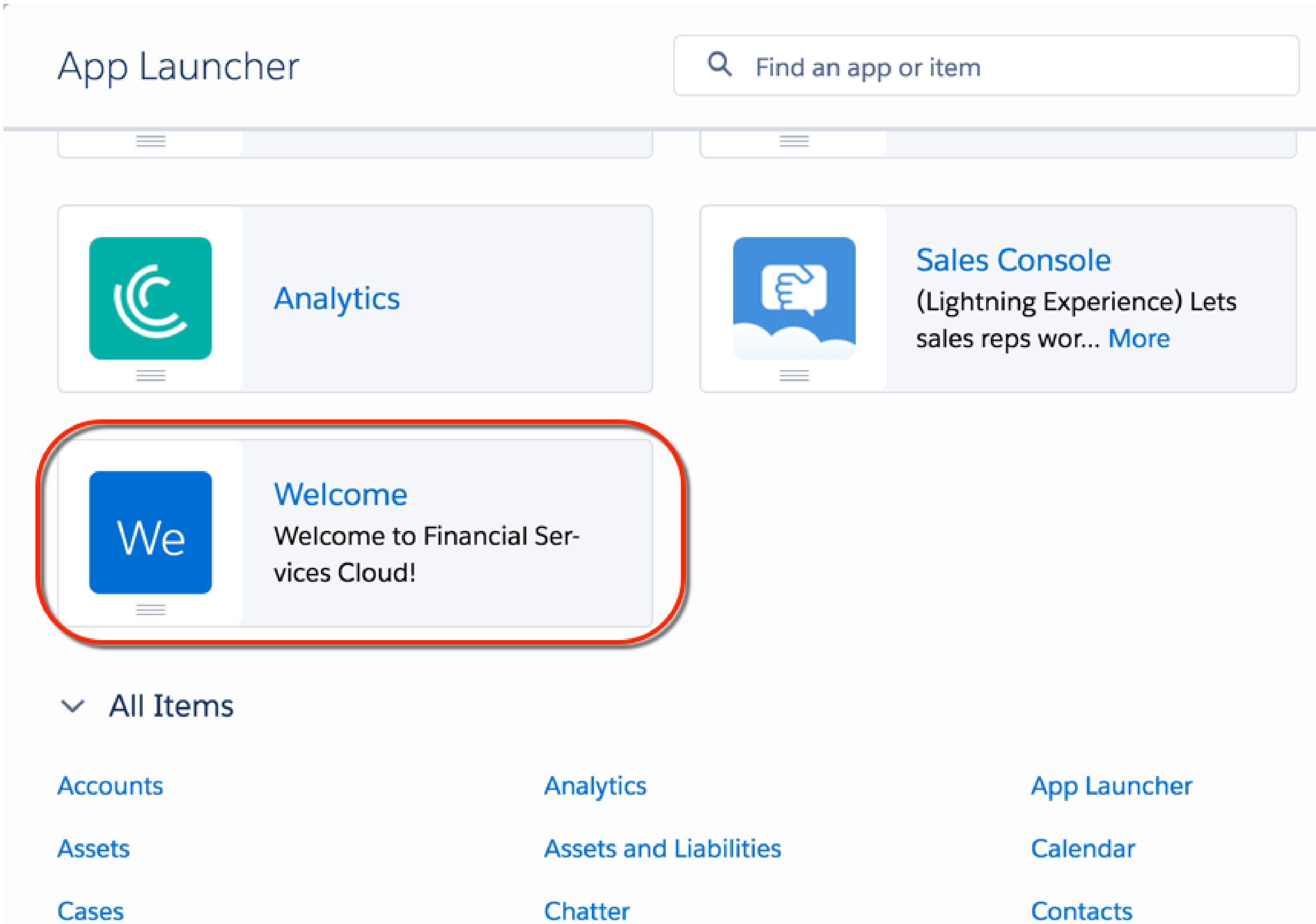
1. Log in to Salesforce as a Salesforce admin.

2. From the App Launcher menu, verify that you can see the Welcome app, as shown here:



Great, you are ready to get started.

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

Register a My Domain Subdomain

To access Financial Services Cloud, you must have My Domain enabled. Register a subdomain with the My Domain wizard and then deploy it.

1. From Setup, enter `My Domain` in the Quick Find box, and then select **My Domain**.
2. Enter the subdomain name you want to use.

   The subdomain appears in your firm's login URL as `https://subdomain.my.salesforce.com`.

   Your subdomain can't contain these reserved words:

   - www
   - salesforce
   - heroku

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And, you can't start the domain name with:

- root
- status

3. Click **Check Availability**. If your name is already taken, choose a different one.
4. Click **Register Domain**.

   To check the registration status, refresh the page or wait for the confirmation email. It can take up to 3 minutes.

   After registration is confirmed, your domain is ready for testing and deployment.
5. Click **Log In**.
6. (Optional) Register your mobile phone.
7. If you land on the Salesforce home page, return to **My Domain** in Setup.
8. Click **Deploy to Users**, and confirm that you want to permanently deploy the custom domain to users.

SEE ALSO:

My Domain

Create Users

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

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

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 may assign custom permission sets as desired to provide additional access, as required by the user's persona.

7. Save your changes.
8. For Enterprise Editions and Unlimited Editions only, proceed with the following steps to assign Einstein Analytics for Financial Services Cloud access permissions to the Admin user.

a. Click **Permission Set License Assignments** and then click **Edit Assignments**.

b. Enable the **Analytics Embedded App** permission set license.

c. Save your changes.

d. Click **Permission Set Assignments** and then click **Edit Assignments**.

e. From Available Permission Sets, add the relevant permission sets to Enabled Permission Sets as shown below.

User Persona	Permission Sets to Add
Admin	FSC Analytics Admin
Advisor	FSC Analytics Advisor
Personal Banker	FSC Analytics Advisor

f. Save your changes.

Create User Profiles for Other User Personas

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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.

Schedule Data Refreshes in Einstein Analytics

EDITIONS

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

To take advantage of Einstein Analytics for Financial Services Cloud, schedule a daily refresh of your data.

1. From the App Launcher menu, click **Analytics Studio**.
2. From Setup ( ) within Analytics, click **Data Manager**.
3. Click the **Dataflows & Recipes** tab.
4. Next to Financial Services Cloud Dataflow, select **Schedule** from the dropdown.
5. Specify when to refresh the data.
6. Save your changes.
7. Next to Financial Services Cloud Dataflow, select **Start** from the dropdown.

The time needed to refresh your data depends on the size of the datasets. You can check the status on the Monitor tab.

SEE ALSO:

Analytics Glossary