Flourish + Salesforce Integration Guide

The Salesforce + Flourish integration gives advisors the ability to send Flourish invitations and prefill client applications with the click of a button, as well as view Flourish balances, statuses, and account types – all from within Salesforce.[Δ]

For Advisors: Using the Integration after Set-Up

After your Salesforce administrator has set up the integration, you can learn more about using the integration in the first few sections of this guide:

- Inviting Clients to Flourish
- Resending Invitations
- Sync existing Flourish and Clients
- Joining Households

For Salesforce Admins: Setting up the Integration

Total estimated time: *~1-2 hours*

This section is for Salesforce administrators who are setting up the integration for the first time.

Please note that this process will differ depending on existing packages installed with your Salesforce instance, including Financial Services Cloud, Practifi, XLR8, or Salentica. You can find package-specific instructions within Step 4.

- Step 1: API Access and IP Address
- Step 2: Install the Integration Package
- Step 3: Connect the Application to Flourish
- Step 4: Objects and Field Mapping
    - A. Salesforce
    - B. Financial Services Cloud
    - C. Practifi
    - D. Salentica

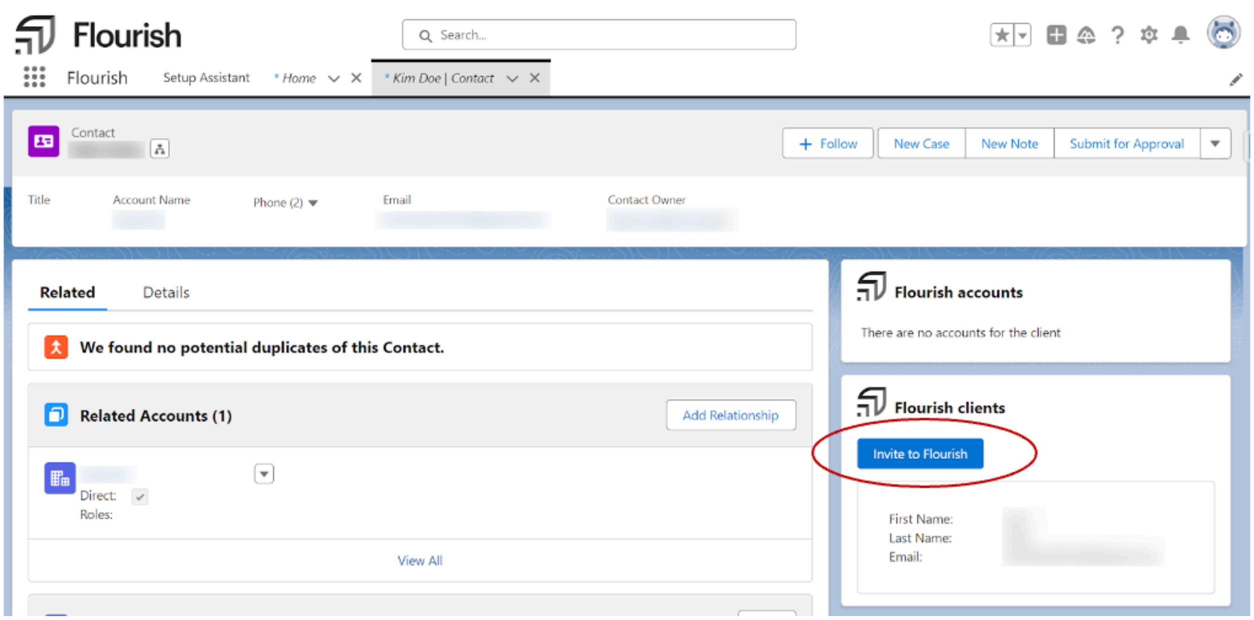
Flourish

For Advisors: Using the Integration after Set-Up

Inviting Clients to Flourish

This section explains how advisors can use the integration to invite clients after it has been set up by your Salesforce administrator.

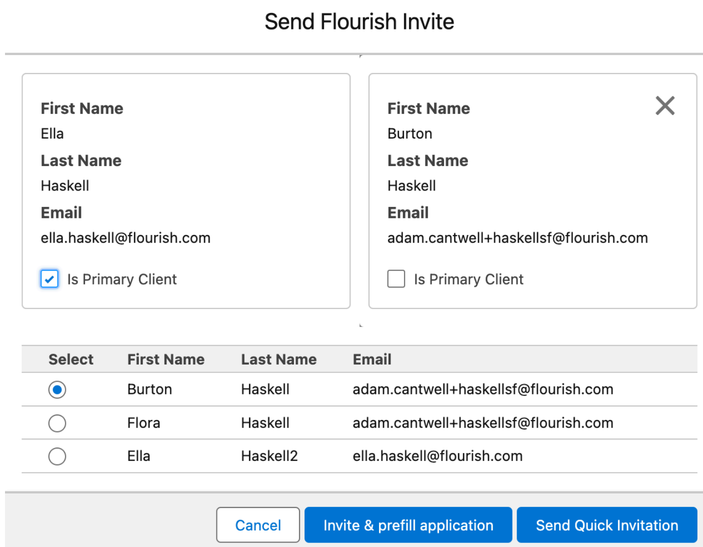
1. Navigate to the client contact page that you would like to invite to Flourish
2. Find the “Invite to Flourish” button within the Flourish widget
    a. If the button is grayed out, this client may not have a Household and/or Household Relationship set up, which will need to be done by your Salesforce administrator.
    b. If you do not see the Flourish widget, ask your Salesforce administrator to add it to the contact page default view.



3. For households with two or more members within Salesforce, you have the option to invite either one or two household members to Flourish.
    a. Flourish households have a maximum of two members, with one member designated as the “**primary client**.” Two-person households are able to create joint accounts.
        i. **Primary client:** when a joint account is established, including joint revocable trust accounts, Flourish will use the primary client’s Social Security Number in tax reporting
    b. The screenshot below shows a household with 3 members, with the invite

initiated from Ella Haskell's contact page. By selecting a second household member in the list below and/or by removing household members by clicking the "X" in the top right of the screen, an advisor could invite Ella alone or could invite both Ella and a second household member at the same time.

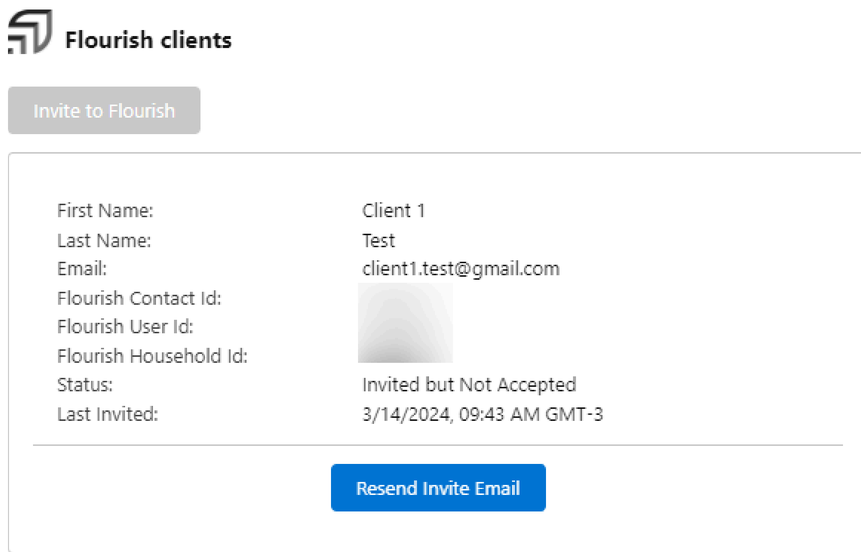
i. Note: if you'd like to invite more than two members of a household to Flourish, you will need to send the additional invites through the Flourish advisor portal.



4. When sending an invitation, you can choose between "Invite & prefill application" and "Send Quick Invitation."
    a. **Send Quick Invitation**: An email invitation will be immediately sent to the client with a link to establish their profile and open a Flourish account.
    b. **Invite & prefill application**: You will be redirected to a temporary Flourish tab to prefill the account application and send the invitation using contact information from Salesforce. Once you complete this process, an email notification will be sent to the client with a link to review, edit, and submit the application with all the information you prefilled for their convenience.
        i. You can prefill as much or as little information as you would like
        ii. If any of the pre-filled fills are missing or were incorrectly prefilled, reach out to your Salesforce administrator.

Resending Invitations

If a Client has been invited to Flourish via the Salesforce integration but the client has not yet set up their Flourish login, you can click on the "Resend Invite Email" button within the Flourish widget on the relevant contact page to resend the invitation.

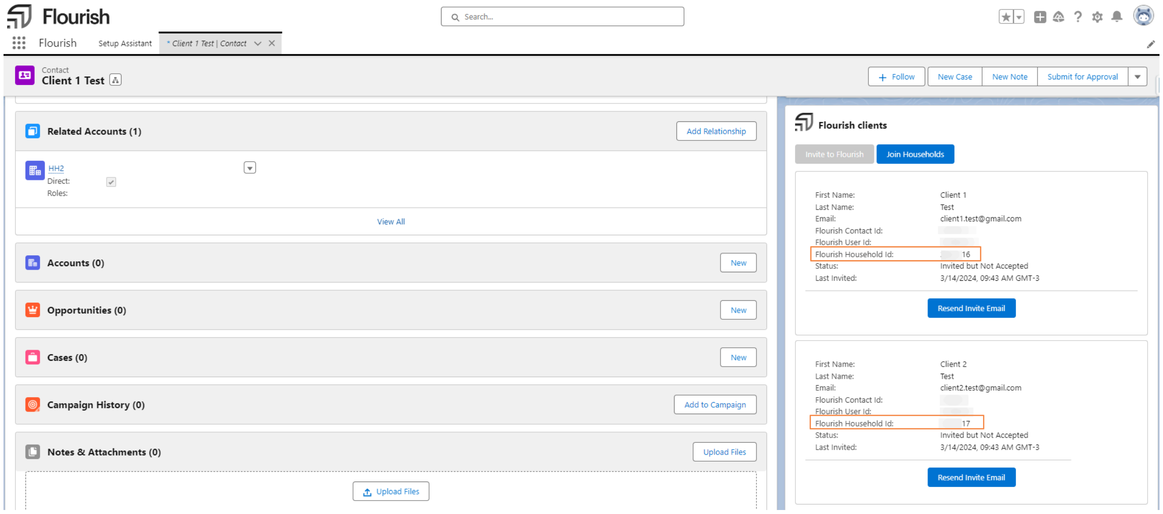


Joining Households

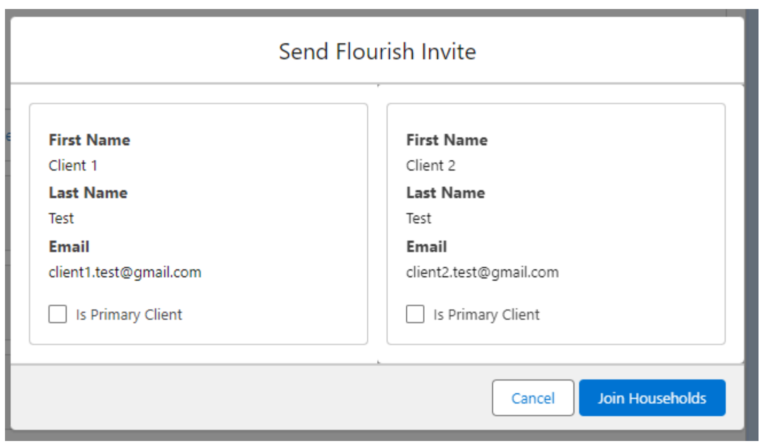
If you have one Salesforce client invited to one Flourish Household and another Salesforce Client invited to a separate Flourish Household, you can join the two households together within both Salesforce and Flourish.

1. For example, let's assume you want to add 'Client 1' to 'Client 2's' household.
2. Navigate to Client 1's contact page and look for the Household Client relationship on the left hand side
   a. For **Financial Services Cloud**, this could be called 'Account Contact Relationship'
   b. For **Practifi**, **Salentica**, or **XLR8**, this could be called 'Relationship'
   c. For other versions of Salesforce, this could be called 'Household Client Relationship' or 'Related Accounts'
3. Click the 'New' button, search for Client 2's household, and click 'Save.'
4. Delete the existing Household Client relationship between Client 1 and their current Household.
5. Refresh Client 1's contact page. You should now see a "Join Households" button at the top of the Flourish module:

Flourish



- Click “Join Household.” On the pop up, select the primary client and once again click “Join Households.”



- Both Client 1 and Client 2 are now joined in the same Flourish household.

Flourish

For Salesforce Admins: Setting up the Integration

Step 1: API Access and IP Address

This section is for Salesforce administrators who are setting up the integration for the first time.

In order to get started with the Salesforce integration, send an email to integrations@flourish.com with the following:

1. Request your firm's Flourish API Key ID and API Key.
2. In order for Flourish to generate the API information, you will need to complete a brief legal agreement with Flourish that will be sent via DocuSign. Let us know the name and email of who this agreement should be sent to at your firm.
3. Provide your Salesforce specific IP address (*see below*).
4. The email should be sent by, or copy, one of your firm's Flourish Executives.
5. Include the contact information of someone at your firm who has an administrator account with Salesforce.

To find your firm's **Salesforce specific IP address**, follow the instructions below or in the video linked here.

1. In your Salesforce instance, from 'Setup,' search and select 'Remote Site Settings'
2. Click 'New Remote Site'
3. Enter the following details
    a. Remote Site Name: FindIPAddress
    b. Remote Site URL: https://api.ipify.org
    c. Active: checked
4. Click 'Save'
5. From the setup gear in the top right of the Salesforce org, click 'Developer Console'
6. Developer Console will open in a new window
7. 'Ctrl + e' to open the execute window
8. Copy & paste the entire text in the code space below

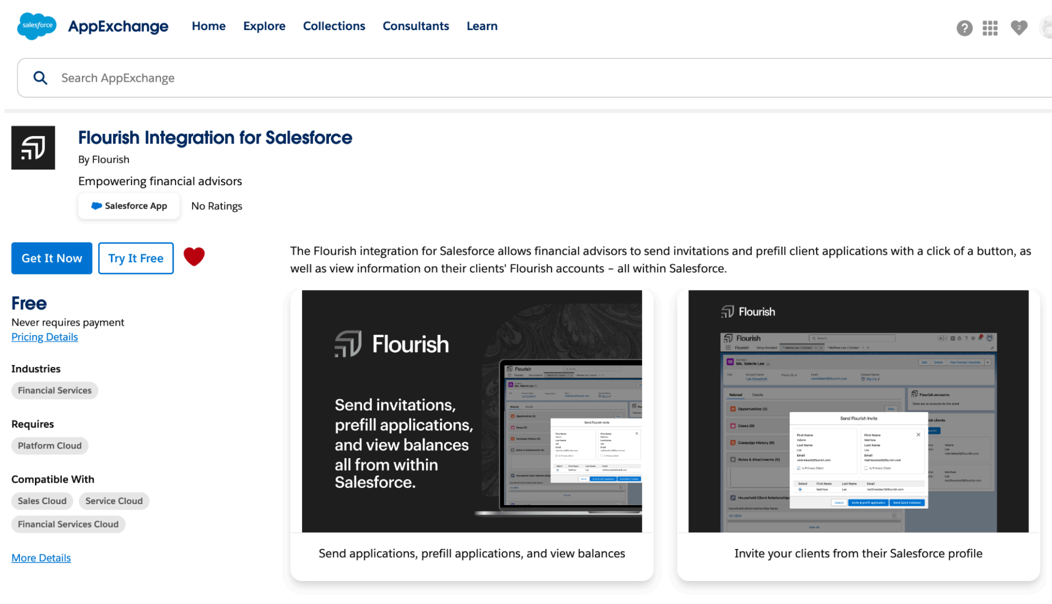
```
HttpRequest request = new HttpRequest();
request.setEndpoint('https://api.ipify.org');
request.setMethod('GET');
Http http = new Http();
HttpResponse response = http.send(request);
String responseBody = response.getBody();
```

```
System.debug('IP Address: ' + responseBody);
```

9. Click 'Execute'
10. Double click the row that appears in the 'Logs' tab at the bottom of the Developer Console.
11. In the Execution Log, scroll down to find a row similar to the following: "[6]|responseBody|"13.100.242.8"
12. Take the last part of this text (13.100.242.8 in the example above) and include it in the email you send to integrations@flourish.com.

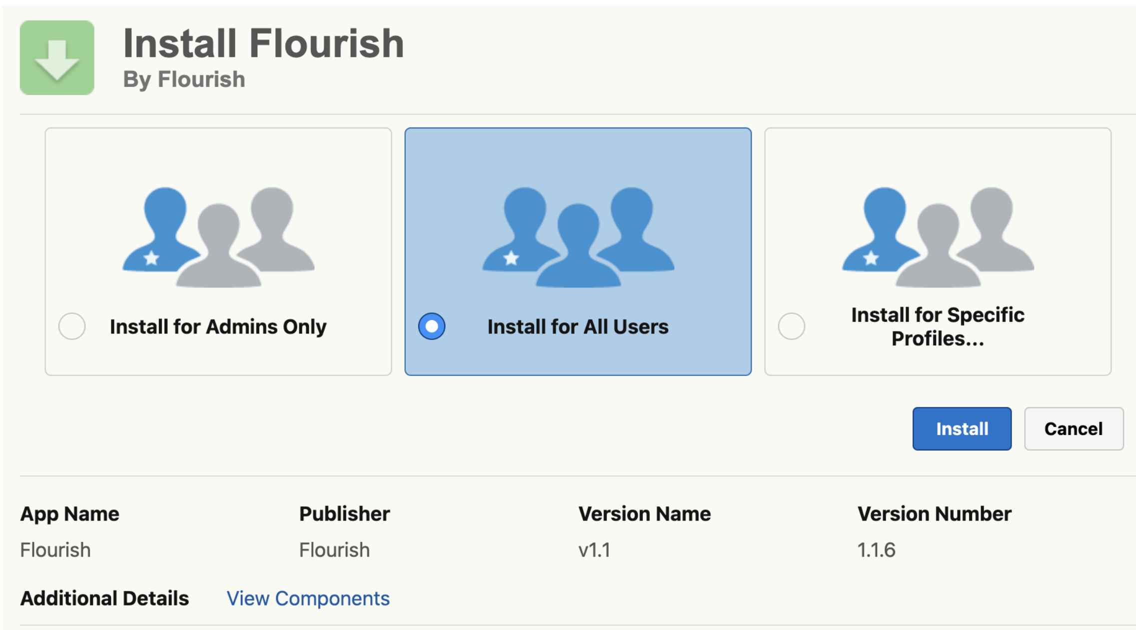
Step 2: Install the Integration Package

1. Search the [Salesforce AppExchange]() for [Flourish] and click "Get It Now"



2. You will soon reach a screen where you will choose who to install the app for:
    a. Install for Admins Only
        i. Recommended for advanced users or **firms who have restrictions on who can send Flourish invites**
        ii. To control who has the ability to send invites via Flourish, ensure the corresponding user has the correct Permission Sets.
        iii. You can check and add to a user's Permission Sets by going to Setup -> Users -> Users -> Click on their Full Name. You can check the "Permission Set Assignments" and / or their "Permission Set Group Assignments" sections, and click "Edit" in either section to add the "Flourish Basics" or "Flourish Admin" Permission Set.
        iv. The "Flourish Basic" Permission Set gives access to all the

        functionality of the Flourish integration, including sending invitations and viewing account balances (account balances will only display if toggle 1 in Step 5 is on)
    v. The "Flourish Admin" Permission Set gives access to all the functionality of the "Flourish Basic" permission set, as well as the Flourish Setup screen in Step 4.
  b. Install for All Users
    i. **Recommended for firms where there are no restrictions for who can send a Flourish invite**
  c. Install for Specific Profiles



3. The installation process may take several minutes.
    a. If the installation time takes longer than expected, you can navigate away and Salesforce will email you once the process is complete.

Step 3: Connect the Application to Flourish

Add a Flourish Named Credential

1. Navigate to the Salesforce Setup Menu by clicking the gear icon in the top right corner.
2. In the Home tab, search for and click on "Named Credentials."
3. Click the arrow next to the "New" button and choose the "New Legacy" option.
4. Enter in the following information:
    a. Label: Flourish
    b. Name: Flourish

   c. URL: https://www.flourish.com/
   d. Note that the input "Flourish" for Label and Name is case sensitive and must start with a capital "F"
5. Click "Save."

Add a Linked Field to Advisor Household Relationship

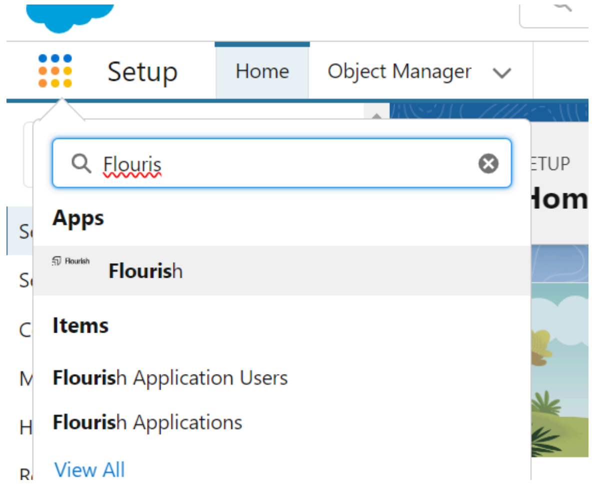
Before beginning the mapping process, you will need to create a custom Lookup field on the "Advisor Household Relationship" object, which is a custom object that was automatically created by the Flourish installation package. This custom look-up field will point to the object that represents the household in your Salesforce instance.

1. Click on the gear icon in the upper right corner to go to Setup.
2. Navigate to the "Object Manager" tab and find the object that you want to add a field to (e.g. Advisor Household Relationship).
3. Click into the object and go to "Fields & Relationships."
4. Click on "New" on the right hand side.
5. Select "Lookup Relationship" → Next.
6. Select the object that you want to look up
   a. For **Generic Salesforce**, this is commonly the "**Account**" object
      i. *This version of Salesforce is without any popular packages installed (e.g., Financial Services Cloud, Practifi, Salentica, XLR8) and can refer to either Sales Cloud or Marketing Cloud)*
   b. For **FSC**, this is commonly the "**Account**" object
   c. For **Practifi**, this is commonly the "**Entity**" object
   d. For **Salentica**, this is commonly the "**Relationship**" object
   e. For **XLR8**, this is commonly the "**Entity**" object
7. You can click Next until the field is created.

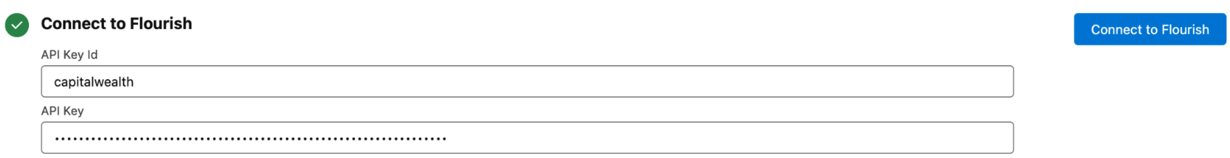
Connect to the Flourish API

1. Navigate to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish.

Flourish

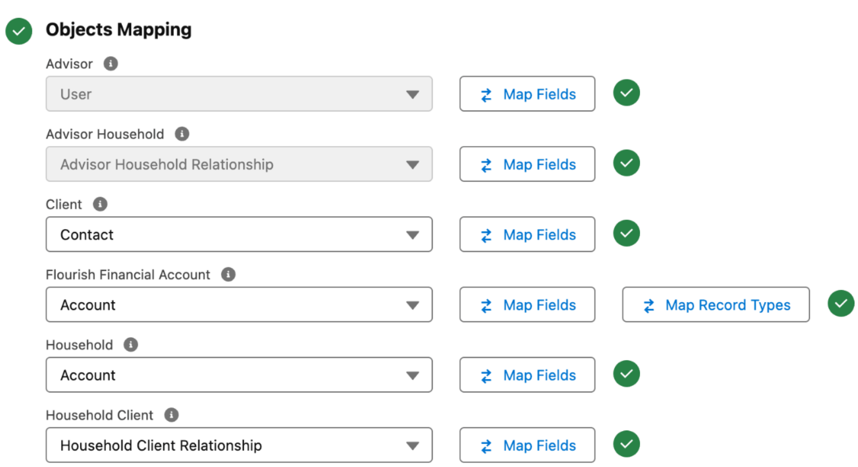


2. In the “Connect to Flourish” section, enter in the API Key ID and API Key that was emailed to you by the Flourish team in Step 1.
3. Click “Connect to Flourish.” This may take up to 1 minute to complete.



Step 4: Objects and Field Mapping

In this section, you will map a number of Salesforce fields to Flourish fields. Note that you will select field names based off of the “Label” name and not the “API Name.”



The next steps will differ depending on what version of Salesforce or overlay you are using. We have provided instructions based on several commonly used integration packages and Salesforce installations.

Click on the section that best corresponds to your Salesforce instance.

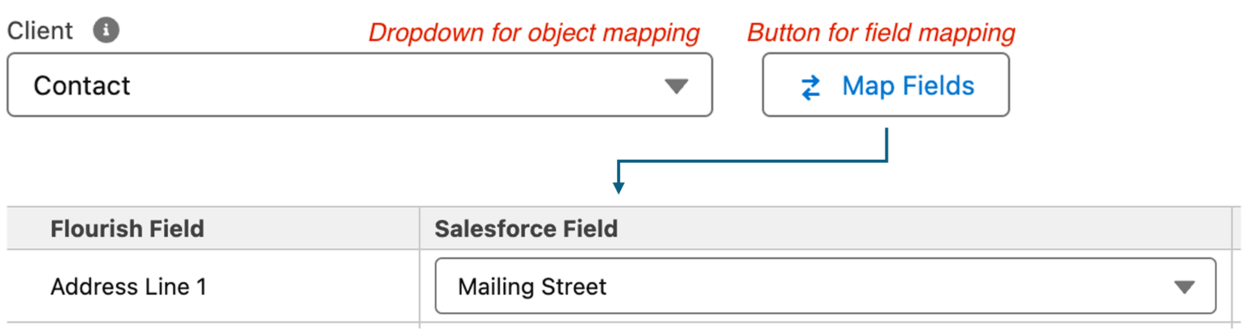
- A. Salesforce
    - *"Salesforce" refers to Salesforce without any popular packages installed (e.g., Financial Services Cloud, Practifi, Salentica, XLR8) and can refer to either Sales Cloud or Marketing Cloud.*
- B. Financial Services Cloud
- C. Practifi
- D. Salentica
- E. XLR8

A. Salesforce

Note that in sub-section 5 of this section (titled “Flourish Account Details”), you may wish to create a number of additional fields in order to fully map Flourish account details into Salesforce. You can create these fields before you begin the mapping process; alternatively, at any point in time, you can click “Save current mapping,” create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

You will now proceed to map each of the Flourish fields to existing Salesforce fields. For each field, you will map the object by clicking the dropdown menu and then mapping the fields by clicking on the ‘Map Fields’ button. The following tables have commonly used field names to help with the field mapping, but these names can differ depending on the settings for your firm.

Mapping Example



1. Advisor – **[Mapped by default]** This object represents the advisor and is already mapped to the User object. The Reporting Representative Id is only used if you already have an internal identifier that you want to use to identify advisors, not mapping the field will not impact the integration experience.

Flourish Field	**Salesforce Field (Recommended)**
Reporting Representative Id (Optional)	*Advisor ID*

2. Advisor Household – **[Mapped by default]** This object represents the relationship between the advisor and household and is already mapped to a custom object called ‘Advisor Household Relationship’ that was created by the Flourish package. If you have just created a custom lookup field, remember to Save current mapping and refresh the page.

Flourish Field	Salesforce Field (Recommended)
Advisor	*Advisor (mapped by default)*
Household	*Account*

3. Client – This refers to the individual associated with a Flourish account. This will commonly be the “**Contact**” object for generic Salesforce packages. While all fields here other than Email, First Name, and Last Name are optional, we recommend mapping as many of the optional fields as possible, as they will be used to automatically prefill application information.

Flourish Field	Salesforce Field (Recommended)
Address Line 1 (Optional)	*Mailing Street*
City (Optional)	*Mailing City*
Current Employer (Optional)	*Employer*
Date of Birth (Optional)	*Birthdate*
Email	*Email*
First Name	*First Name*
Middle Name (Optional)	*Middle Name*
Last Name	*Last Name*
Gender (Optional)	*Gender*
Mobile Phone (Optional)	*Mobile*
Occupation (Optional)	*Occupation*
Postal Code (Optional)	*Mailing Zip/Postal Code*
State (Optional)	*Mailing State/Province*
Tax Id (Optional)	*Tax id*
Work Phone (Optional)	*Phone*

4. Flourish Account Details
    a. This object represents where financial information about your client is stored in Salesforce. This is typically the “**Account**” object in generic Salesforce and should be the same object as you select in Step 5 (below).
    b. Note that if “Allow Data Sharing” in Step 5 is turned off, then mapping for

this section is disabled. Data Sharing allows advisors to view detailed Flourish account information within Salesforce and is turned on by default.

c. If you would like to create these fields at this point in type, you can simply click "Save current mapping" to save your progress, create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	**Salesforce Field (Recommended)**
Flourish Account Balance	*[Create or use a numeric field as described in Step 4a]*
Flourish Account Create Date	*[Create or use a date/time field as described in Step 4a]*
Flourish Account Id	*[Create or use a text field as described in Step 4a]*
Flourish Account Primary Owner	*[Create or use a lookup field to the object used for Client as described in Step 4a]*
Flourish Account Status	*[Create or use a text field as described in Step 4a]*
Flourish Account Type	*[Create or use a text field as described in Step 4a]*
Household	*Account ID*

Map Record Types – This is an optional section if your firm differentiates between different account types (i.e. investment vs. retirement) and you want to map specific Flourish account types to the corresponding account record types. Not mapping the fields will not impact the integration experience.

Flourish Field	**Salesforce Field (Recommended)**
Annuity Account	*[Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to an annuity.]*
Cash Account	*Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to a cash account.*

5. Household – This is the object that holds all the members of a household. This will likely be the "**Account**" object in generic Salesforce. The Reporting Household Id is only used if you already have an internal identifier that you want to use to identify households, not mapping the field will not impact the

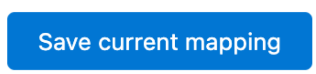
integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Household Id (Optional)	*Account ID*

6. Household Client – This object represents the Household <> Client relationship.
    a. For generic Salesforce, you may already have a custom object that links together clients and households. If you have this object in place, you can map it here.
    b. If you do not have this object in place, you will need to create a custom object for this purpose. You can simply click “Save current mapping” to save your progress, create the new object using the instructions in Step 4b: Creating Custom Salesforce Objects, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	Salesforce Field (Recommended)
Client	*Contact*
Household	*Account*

At this point, click ‘Save Current Mapping’ to save your set mappings.

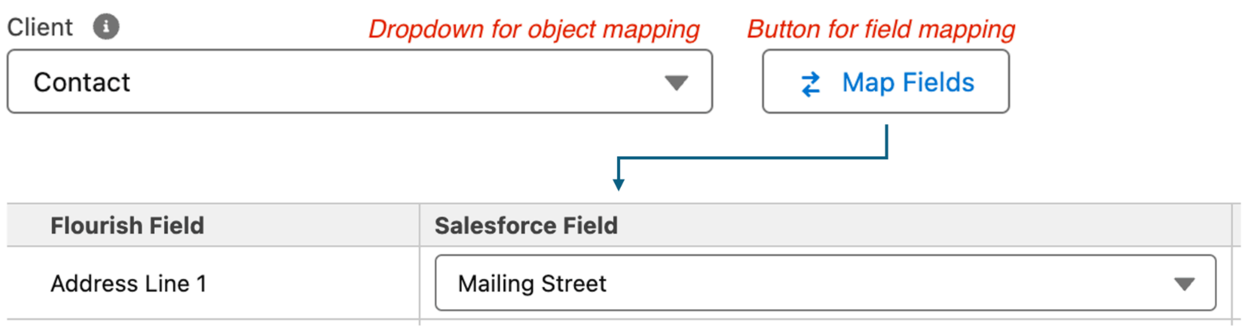


Click the following to go to: Step 5: Setup – Data Sharing & Advisor Permissions.

B. Financial Services Cloud

You will now proceed to map each of the Flourish fields to existing Salesforce fields. For each field, you will map the object by clicking the dropdown menu and map the fields by clicking on the 'Map Fields' button. The following tables have commonly used field names to help with the field mapping, but these names can differ depending on the settings for your firm.

Mapping Example



1. Advisor – **[Mapped by default]** This object represents the advisor and is already mapped to the User object. The Reporting Representative Id is only used if you already have an internal identifier that you want to use to identify advisors, not mapping the field will not impact the integration experience.

Flourish Field	**Salesforce Field (Recommended)**
Reporting Representative Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

2. Advisor Household – **[Mapped by default]** This object represents the relationship between the advisor and household and is already mapped to a custom created object called 'Advisor Household Relationship' within the Flourish package. If you have just created a custom lookup field, remember to Save current mapping and refresh the page.

Flourish Field	**Salesforce Field (Recommended)**
Advisor	*Advisor (mapped by default)*
Household	*Account*

3. Client – This object refers to the individual associated with an account. This will commonly be the "**Person Account**" object for FSC. While all fields here other than Email, First Name, and Last Name are optional, we recommend mapping as

many of the optional fields as possible, as they will be used to automatically prefill application information.

Flourish Field	Salesforce Field (Recommended)
Address Line 1 (Optional)	*Mailing Street*
City (Optional)	*Mailing City*
Current Employer (Optional)	*Current Employer*
Date of Birth (Optional)	*Birthdate*
Email	*Email*
First Name	*First Name*
Middle Name (Optional)	*Middle Name*
Last Name	*Last Name*
Gender (Optional)	*Gender*
Mobile Phone (Optional)	*Mobile*
Occupation (Optional)	*Occupation*
Postal Code (Optional)	*Mailing Zip/Postal Code*
State (Optional)	*Mailing State/Province*
Tax Id (Optional)	*Tax id*
Work Phone (Optional)	*Phone*

4. Flourish Account Details
    a. This object represents where financial information about your client is stored in Salesforce. This will likely be the "**Financial Account**" object in FSC.
    b. Note that if "Allow Data Sharing" in Step 5 is turned off, then mapping for this section is disabled. Data Sharing allows advisors to view detailed Flourish account information within Salesforce and is turned on by default.
    c. If you would like to create these fields at this point in type, you can simply click "Save current mapping" to save your progress, create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	Salesforce Field (Recommended)
Flourish Account Balance	*Balance*
Flourish Account Create Date	*Date Opened* *[or create or use a date/time field as described in Step 4a]*
Flourish Account Id	*Account Number*
Flourish Account Primary Owner	*Primary Owner*
Flourish Account Status	*Status*
Flourish Account Type	*Type*
Household	*Household*

Map Record Types – This is an optional section if your firm differentiates between different account types (i.e. investment vs. retirement) and you want to map specific Flourish account types to the corresponding account types. Not mapping the fields will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Annuity Account	*Investment Account*
Cash Account	*Bank Account*

5. Household – This is the object that holds all the members of a household. This will likely be the "**Account**" object in FSC. The Reporting Household Id is only used if you already have an internal identifier that you want to use to identify households, not mapping the field will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Household Id (Optional)	*Account Number*

6. Household Client – This object represents the Household <> Client relationship. This will likely be the "**Account Contact Relationship**" object in FSC.

Flourish Field	Salesforce Field (Recommended)
Client	*Contact*

Flourish

Household	*Account*

At this point, click ‘Save Current Mapping’ to save your set mappings.

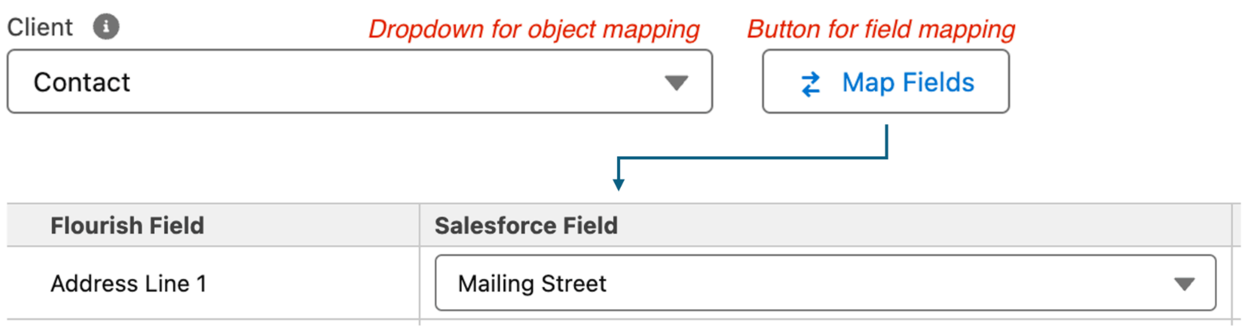
Save current mapping

Click the following to go to: Step 5: Data Sharing & Advisor Permissions.

C. Practifi

You will now proceed to map each of the Flourish fields to existing Salesforce fields. For each field, you will map the object by clicking the dropdown menu and map the fields by clicking on the ‘Map Fields’ button. The following tables have commonly used field names to help with the field mapping, but these names can differ depending on the settings for your firm.

Mapping Examplehjfkiuhjrnedhd



1. Advisor – **[Mapped by default]** This object represents the advisor and is already mapped to the User object. The Reporting Representative Id is only used if you already have an internal identifier that you want to use to identify advisors, not mapping the field will not impact the integration experience.

Flourish Field	**Salesforce Field (Recommended)**
Reporting Representative Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

2. Advisor Household – **[Mapped by default]** This object represents the relationship between the advisor and household and is already mapped to a custom created object called ‘Advisor Household Relationship’ within the Flourish package. If you have just created a custom lookup field, remember to Save current mapping and refresh the page.

Flourish Field	**Salesforce Field (Recommended)**
Advisor	*Advisor (mapped by default)*
Household	*Entity*

3. Client – This object refers to the individual associated with an account. This will likely be the “**Contact**” object for Practifi. While all fields here other than Email, First Name, and Last Name are optional, we recommend filling in as many of the

optional fields as possible, as they will be used to automatically prefill applications before sending them out to the clients.

Flourish Field	**Salesforce Field (Recommended)**
Address Line 1 (Optional)	*Mailing Street*
City (Optional)	*Mailing City*
Current Employer (Optional)	*Employer*
Date of Birth (Optional)	*Birthdate*
Email	*Email*
First Name	*First Name*
Middle Name (Optional)	*Middle Name*
Last Name	*Last Name*
Gender (Optional)	*Gender*
Mobile Phone (Optional)	*Mobile*
Occupation (Optional)	*Occupation*
Postal Code (Optional)	*Mailing Zip/Postal Code*
State (Optional)	*Mailing State/Province*
Tax Id (Optional)	*Tax ID Number*
Work Phone (Optional)	*Work Phone*

4. Flourish Account Details
    a. This object represents where financial information about your client is stored in Salesforce. This will likely be the “**Asset/Liability”** object in Practifi.
    b. Note that if “Allow Data Sharing” in Step 5 is turned off, then mapping for this section is disabled. Data Sharing allows advisors to view detailed Flourish account information within Salesforce and is turned on by default.
    c. If you would like to create these fields at this point in type, you can simply click “Save current mapping” to save your progress, create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	Salesforce Field (Recommended)
Flourish Account Balance	*Value*
Flourish Account Create Date	*Account Open Date*
Flourish Account Id	*External Id*
Flourish Account Primary Owner	*[This will need to be a lookup field to the Contact object]*
Flourish Account Status	*Stage*
Flourish Account Type	*Account Type*
Household	*Related Entity*

6. Map Record Types – This is an optional section if your firm differentiates between different account types (i.e. investment vs. retirement) and you want to map specific Flourish account types to the corresponding account types. Not mapping the fields will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Annuity Account (Optional)	*[Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to an annuity.]*
Cash Account (Optional)	*Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to a cash account.*

5. Household – This is the object that holds all the members of a household. This will likely be the “**Entity**” object in Practifi. The Reporting Household Id is only used if you already have an internal identifier that you want to use to identify households, not mapping the field will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Household Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

6. Household Client – This object represents the Household <> Client relationship. This will likely be the “**Relationship**” object in Practifi.

Flourish Field	Salesforce Field (Recommended)
Client	*From Contact*
Household	*To Entity*

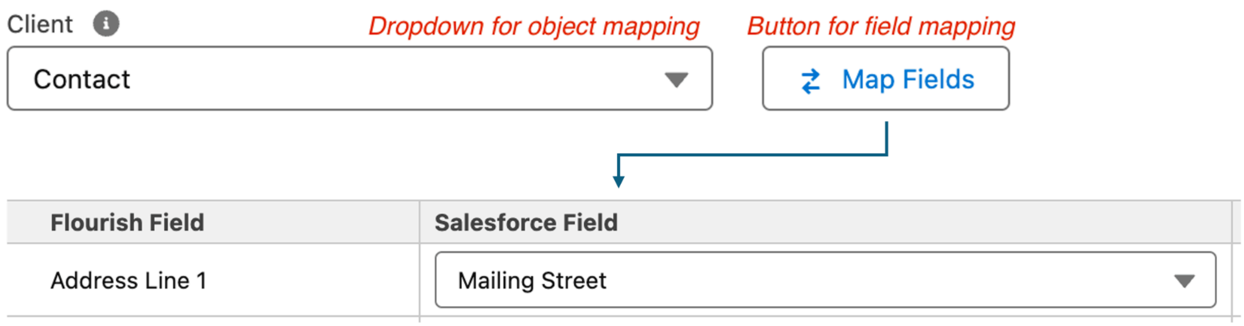
At this point, click ‘Save Current Mapping’ to save your set mappings.

Click the following to go to: Step 5: Setup – Data Sharing & Advisor Permissions.

D. Salentica

You will now proceed to map each of the Flourish fields to existing Salesforce fields. For each field, you will map the object by clicking the dropdown menu and map the fields by clicking on the 'Map Fields' button. The following tables have commonly used field names to help with the field mapping, but these names can differ depending on the settings for your firm.

Mapping Example



1. Advisor – **[Mapped by default]** This object represents the advisor and is already mapped to the User object. The Reporting Representative Id is only used if you already have an internal identifier that you want to use to identify advisors, not mapping the field will not impact the integration experience.

Flourish Field	**Salesforce Field (Recommended)**
Reporting Representative Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

2. Advisor Household – **[Mapped by default]** This object represents the relationship between the advisor and household and is already mapped to a custom created object called 'Advisor Household Relationship' within the Flourish package. If you have just created a custom lookup field, remember to Save current mapping and refresh the page.

Flourish Field	**Salesforce Field (Recommended)**
Advisor	*Advisor (mapped by default)*
Household	*Relationship*

3. Client – This object refers to the individual associated with an account. This will likely be the "**Contact**" object for Salentica. While all fields here other than Email, First Name, and Last Name are optional, we recommend filling in as many of the

optional fields as possible, as they will be used to automatically prefill applications before sending them out to the clients.

Flourish Field	**Salesforce Field (Recommended)**
Address Line 1 (Optional)	*Mailing Street*
City (Optional)	*Mailing City*
Current Employer (Optional)	*Current Employer*
Date of Birth (Optional)	*Date of Birth*
Email	*Primary Email*
First Name	*First Name*
Middle Name (Optional)	*Middle Name*
Last Name	*Last Name*
Gender (Optional)	*Gender*
Mobile Phone (Optional)	*Mobile Phone*
Occupation (Optional)	*Occupation*
Postal Code (Optional)	*Mailing Zip/Postal Code*
State (Optional)	*Mailing State/Province*
Tax Id (Optional)	*SSN/SIN*
Work Phone (Optional)	*Billing Phone*

4. Flourish Account Details
    a. This object represents where financial information about your client is stored in Salesforce. This will likely be the "**Financial Account**" object in Salentica.
    b. Note that if "Allow Data Sharing" in Step 5 is turned off, then mapping for this section is disabled. Data Sharing allows advisors to view detailed Flourish account information within Salesforce and is turned on by default.
    c. If you would like to create these fields at this point in type, you can simply click "Save current mapping" to save your progress, create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	Salesforce Field (Recommended)
Flourish Account Balance	*Total Market Value*
Flourish Account Create Date	*Date Opened* *[or create or use a date/time field as described in Step 4a]*
Flourish Account Id	*Account Number*
Flourish Account Primary Owner	*Primary Account Owner*
Flourish Account Status	*[Create or use a text field as described in Step 4a]*
Flourish Account Type	*Registration Type*
Household	*Relationship*

Map Record Types – This is an optional section if your firm differentiates between different account types (i.e. investment vs. retirement) and you want to map specific Flourish account types to the corresponding account types. Not mapping the fields will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Annuity Account (Optional)	*[Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to an annuity.]*
Cash Account (Optional)	*Optional; mapping is only needed if you have an existing record type within Salesforce that corresponds to a cash account.*

5. Household – This is the object that holds all the members of a household. This will likely be the "**Relationship**" object in Salentica. The Reporting Household Id is only used if you already have an internal identifier that you want to use to identify households, not mapping the field will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Household Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

6. Household Client – This object represents the Household <> Client relationship. This will likely be the "**Account Contact Relationship**" object in Salentica.

Flourish Field	Salesforce Field (Recommended)
Client	*Contact*
Household	*Relationship*

At this point, click ‘Save Current Mapping’ to save your set mappings.

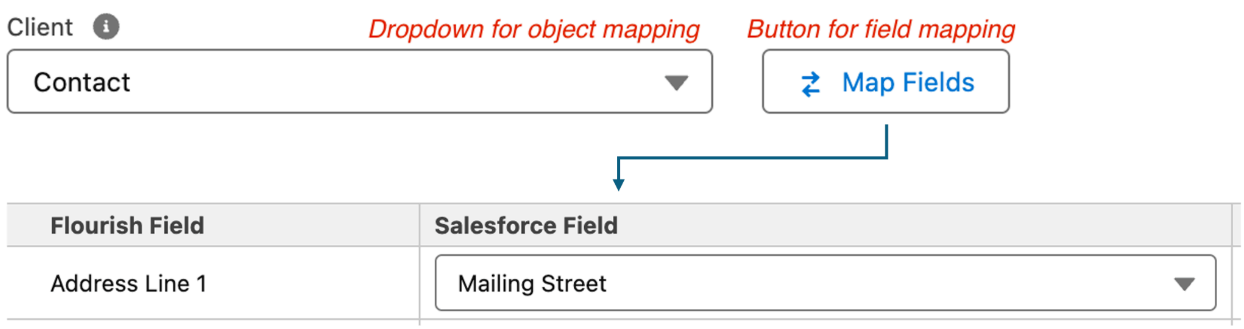
Click the following to go to: *Step 5: Setup – Data Sharing & Advisor Permissions*.

Flourish

E. XLR8

You will now proceed to map each of the Flourish fields to existing Salesforce fields. For each field, you will map the object by clicking the dropdown menu and map the fields by clicking on the 'Map Fields' button. The following tables have commonly used field names to help with the field mapping, but these names can differ depending on the settings for your firm.

Mapping Example



1. Advisor – **[Mapped by default]** This object represents the advisor and is already mapped to the User object. The Reporting Representative Id is only used if you already have an internal identifier that you want to use to identify advisors, not mapping the field will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Representative Id (Optional)	*[No suggestion, if your firm does not have a field created for this you can leave it blank]*

2. Advisor Household – **[Mapped by default]** This object represents the relationship between the advisor and household and is already mapped to a custom created object called 'Advisor Household Relationship' within the Flourish package. If you have just created a custom lookup field, remember to Save current mapping and refresh the page.

Flourish Field	Salesforce Field (Recommended)
Advisor	*Advisor (mapped by default)*
Household	*Entity*

3. Client – This object refers to the individual associated with an account. This will likely be the "**Contact**" object for XLR8. While all fields here other than Email, First Name, and Last Name are optional, we recommend filling in as many of the

optional fields as possible, as they will be used to automatically prefill applications before sending them out to the clients.

Flourish Field	**Salesforce Field (Recommended)**
Address Line 1 (Optional)	*Primary Street*
City (Optional)	*Primary City*
Current Employer (Optional)	*Employer*
Date of Birth (Optional)	*Birthdate*
Email	*Email*
First Name	*First Name*
Middle Name (Optional)	*Middle Name*
Last Name	*Last Name*
Gender (Optional)	*Gender*
Mobile Phone (Optional)	*Primary Phone*
Occupation (Optional)	*Occupation*
Postal Code (Optional)	*Primary Zip*
State (Optional)	*Primary State*
Tax Id (Optional)	*Social Security*
Work Phone (Optional)	*Business Phone*

4. Flourish Account Details
    a. This object represents where financial information about your client is stored in Salesforce. This will likely be the “**Assets & Liabilities”** object in XLR8.
    b. Note that if “Allow Data Sharing” in Step 5 is turned off, then mapping for this section is disabled. Data Sharing allows advisors to view detailed Flourish account information within Salesforce and is turned on by default.
    c. If you would like to create these fields at this point in type, you can simply click “Save current mapping” to save your progress, create the new fields, then return to the Flourish Setup Assistant by clicking on the App Launcher icon and searching for Flourish to complete the mapping process.

Flourish Field	Salesforce Field (Recommended)
Flourish Account Balance	*Value/Balance*
Flourish Account Create Date	*Acquired/Opened Date* *[or create or use a date/time field as described in Step 4a]*
Flourish Account Id	*Asset/Account Number*
Flourish Account Primary Owner	*Primary Owner*
Flourish Account Status	*Status*
Flourish Account Type	*Category*
Household	*Entity*

Map Record Types – This is an optional section if your firm differentiates between different account types (i.e. investment vs. retirement) and you want to map specific Flourish account types to the corresponding account types. Not mapping the fields will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Annuity Account (Optional)	*Retirement Asset*
Cash Account (Optional)	*Financial Asset*

5. Household – This is the object that holds all the members of a household. This will likely be the “**Entity**” object in XLR8. The Reporting Household Id is only used if you already have an internal identifier that you want to use to identify households, not mapping the field will not impact the integration experience.

Flourish Field	Salesforce Field (Recommended)
Reporting Household Id (Optional)	*Entity ID 18*

   a. Household Client – This object represents the Household <> Client relationship. This will likely be the “**Contact**” object in XLR8.

Flourish Field	Salesforce Field (Recommended)
Client	*Contact ID*
Household	*Entity Name*

At this point, click ‘Save Current Mapping’ to save your set mappings.

Step 4a: Creating a new field

If you need to add a new field at any point in Step 4 (commonly, for adding fields to the object you are using for the Flourish Account Details object), you can follow these instructions.

1. Click on the gear icon in the upper right corner to go to Setup.
2. Navigate to the “Object Manager” tab and find the object that you want to add a field to (e.g. Advisor Household Relationship).
3. Click into the object and go to “Fields & Relationships.”
4. Click on “New” on the right hand side.
5. Select the data type that corresponds to the field you are trying to create.
6. You can click Next until the field is created.
7. You can now go back to the relevant setup section using the links below:
    a. A. Salesforce
    b. B. Financial Services Cloud
    c. C. Practifi
    d. D. Salentica
    e. E. XLR8

Step 4b: Creating Custom Salesforce Objects

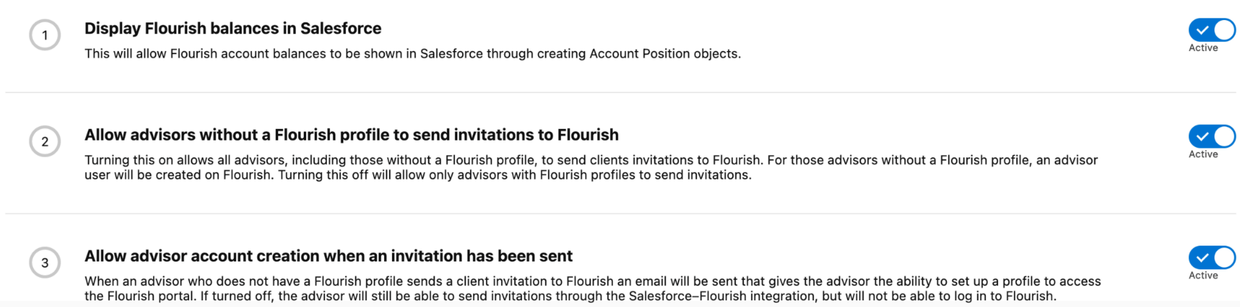
If you need to create a custom object at any point in Step 4 (commonly, for generic versions of Salesforce to represent the relationship between a Household and the Client), you can follow these instructions.

1. Click on the gear icon in the upper right corner to go to Setup.
2. Go to the “Object Manager” tab and click “Create” → “Custom Object” in the upper right
3. Name your custom object in the “Label” field (e.g. Household Client Relationship).
4. Click “Save.”
5. If you are creating the “Household Client Relationship” object, you will have to follow the instructions in “Step 4a: Creating a Lookup field” twice in order to create a lookup field for both the objects that represent the Client and Household.

6. You can now go back to the relevant setup section using the links below:
    a. A. Salesforce
    b. B. Financial Services Cloud
    c. C. Practifi
    d. D. Salentica
    e. E. XLR8

Step 5: Data Sharing & Advisor Permissions

The next section will differ depending on the integrations that you are using with your Salesforce package. We have provided instructions based on several commonly used integration packages and Salesforce installations.



1. Display Flourish balances in Salesforce

a. **Active**: This will allow Flourish account balances to sync to Salesforce and save on the fields represented in the Flourish Account Details object, allowing your advisors to view basic Flourish account information on the relevant contact and household pages. We generally **recommend** keeping Data Sharing ACTIVE so that your advisors can view Flourish data within Salesforce, unless this conflicts with another integration you have set-up.
b. **Inactive**: This will disable Flourish account balances syncing to Salesforce. If this is Inactive, you can skip adding the Flourish Account component in “Step 6: Add Flourish Modules.”

2. Allow advisors without a Flourish profile to send invitations to Flourish

a. **Active**: Every advisor who uses Salesforce will be able to invite clients to Flourish. For those without a Flourish account, they will only receive an invitation email if the “Send Advisor Invitations” toggle is set to On (See below).
b. **Inactive**: Only Salesforce Advisors that have an active Flourish advisor account on Flourish will be able to invite clients to Flourish. Advisors without a Flourish advisor account will receive an error message when

trying to invite clients.

3. **Allow advisor account creation when an invitation has been sent** – Only available if "Auto Create Advisors within Flourish" toggle is set to Active

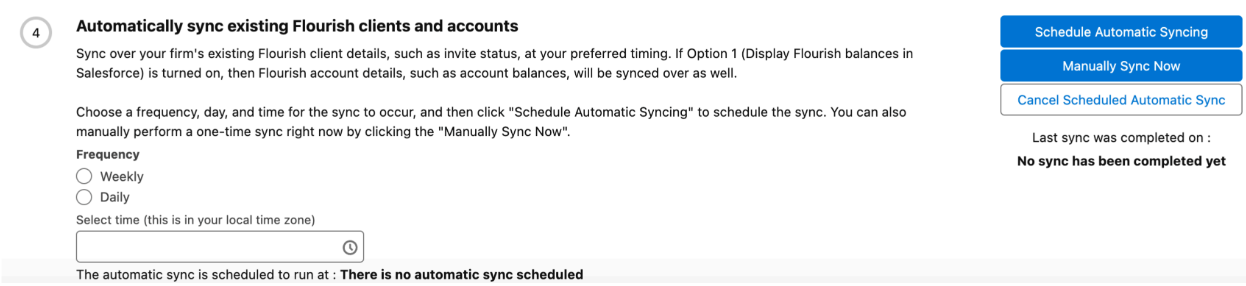
    a. **Active**: When an advisor without a Flourish advisor account sends an invitation to a client, they will also receive an invitation email to create a Flourish advisor account. Invitation will be sent to the email of the currently logged in Salesforce user.
    b. **Inactive**: When an advisor without a Flourish advisor account sends an invitation to a client, the advisor will not receive an email invitation to create a Flourish advisor account.

Before going to the next step, remember to click 'Save current mapping' for the previous section if you have not already done so!

Step 6: Sync existing Flourish Clients

The last section of the Flourish setup section will help you set up an automatic sync of Flourish accounts and balances, ensuring that Flourish data remains up-to-date and accurate within SalesForce.

1. Scroll down to the section titled "Automatically sync existing Flourish clients and accounts." If you have previously set up the integration and need to return to this page, click on the app launcher in the upper left hand corner, search for and click on the "Flourish" app, and scroll down to the relevant section.



2. Choose the intended Frequency, Day (if Weekly frequency), and Time for your scheduled sync. We recommend setting the daily sync for 3:00 AM EST (12:00 AM PST).

3. Click on "Schedule Automatic Syncing." The time that you selected should now appear at the bottom of this section next to "The automatic sync is scheduled to run at: [scheduled time and date].

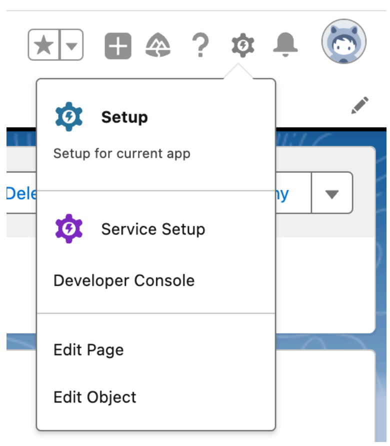
4. If you have any existing clients that you want to sync over, you can click "Manually Sync Now" to perform a one-time sync of their data.

If you want to cancel the scheduled sync, click on the "Cancel Scheduled Automatic Sync" button. The time shown below the "Last sync was completed on:" section indicates the time of the most recent completed sync.

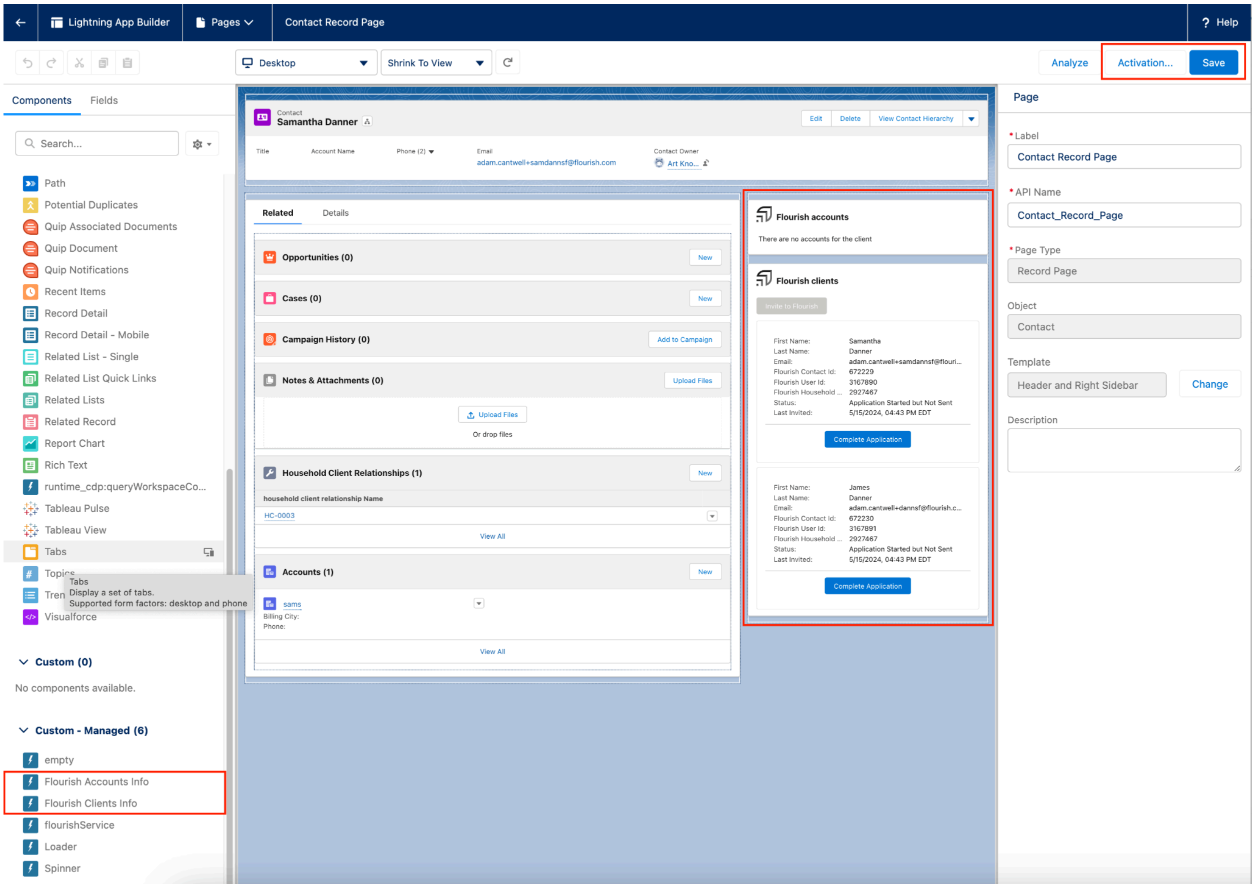
Step 7: Add Flourish Modules

You will next add the Flourish Modules to the relevant pages (typically, both the Contact and Household page) so that your advisors can leverage the integration.

1. While on the Contact page, click on the gear icon and click "Edit Page"



2. On the left hand pane, find the "Flourish Accounts Info" and "Flourish Clients Info" components. You can ignore the 'flourishService' component. Click and drag both of these components onto the page.
    a. If "Allow Data Sharing" from [Step 5](#) is active, we recommend adding the 'Flourish Accounts info' module as well



3. Click on “Activation” in the top right corner to set this page layout as the default and click “Save”

That’s it! You’ve enabled the integration for your advisors.

Questions / Support

- For any additional questions, please reach out to integrations@flourish.com.

Flourish

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