Nest Wealth

Nest Wealth Pro for Salesforce

Installation & Configuration Guide

UPDATED

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PREPARED BY

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Table Of Contents

1.0 Package Details

The following details are in reference to the Nest Wealth Pro for Salesforce AppExchange Package:

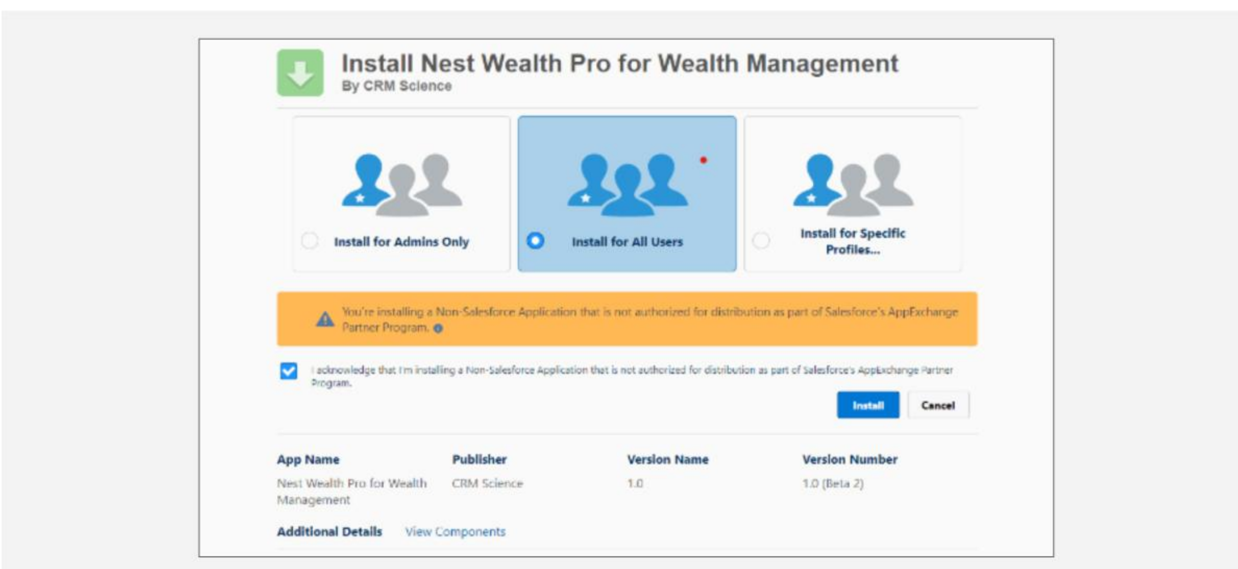
Package Info

- Latest Package Version: 1.1
- Version ID: **04t8c00000qXvJ**
- Package Installation URL :
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t8c000000qXvJ

2.0 Production Deployment Steps

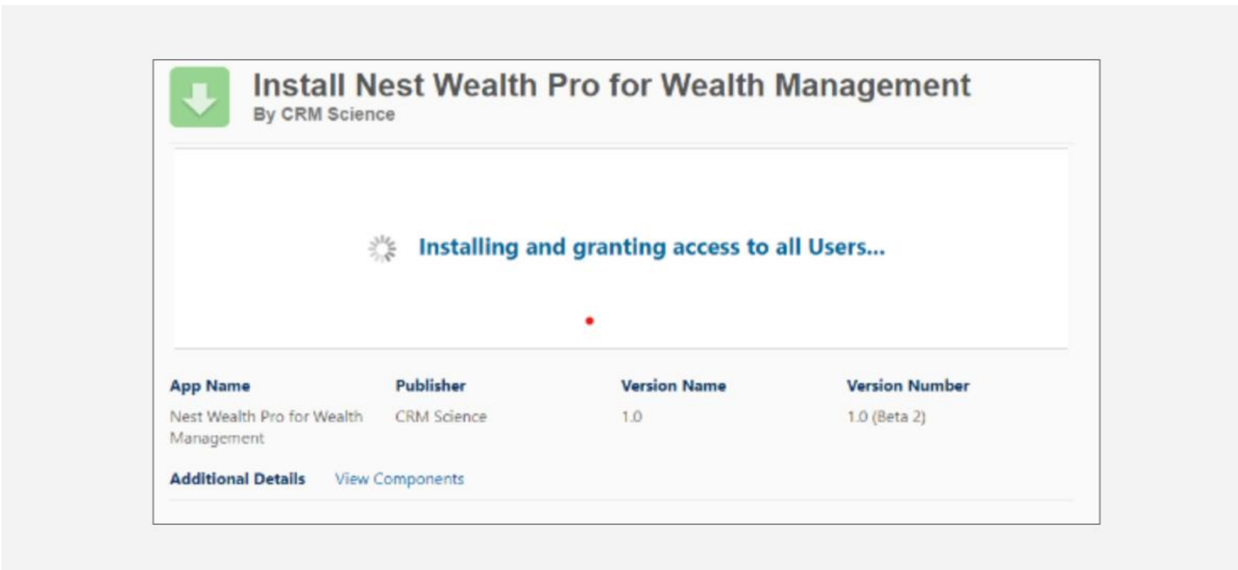
2.1 Installation

1. Install the latest version of the package by clicking **here**.



2. Select the appropriate permissions. Recommend that you "Install for All Users".

3. Select the Install Button.



4. Select Done Button.

3.0 Permission Sets

There are **5 permission sets** that are available for the Nest Wealth Pro for Wealth Management Application.

1. Nest Wealth Integration User - This is the user you will define as the Run As user in the Connect App Configuration section below.

2. Nest Wealth Admin - Provides access to the Nest Wealth Pro App plus the Configuration page.

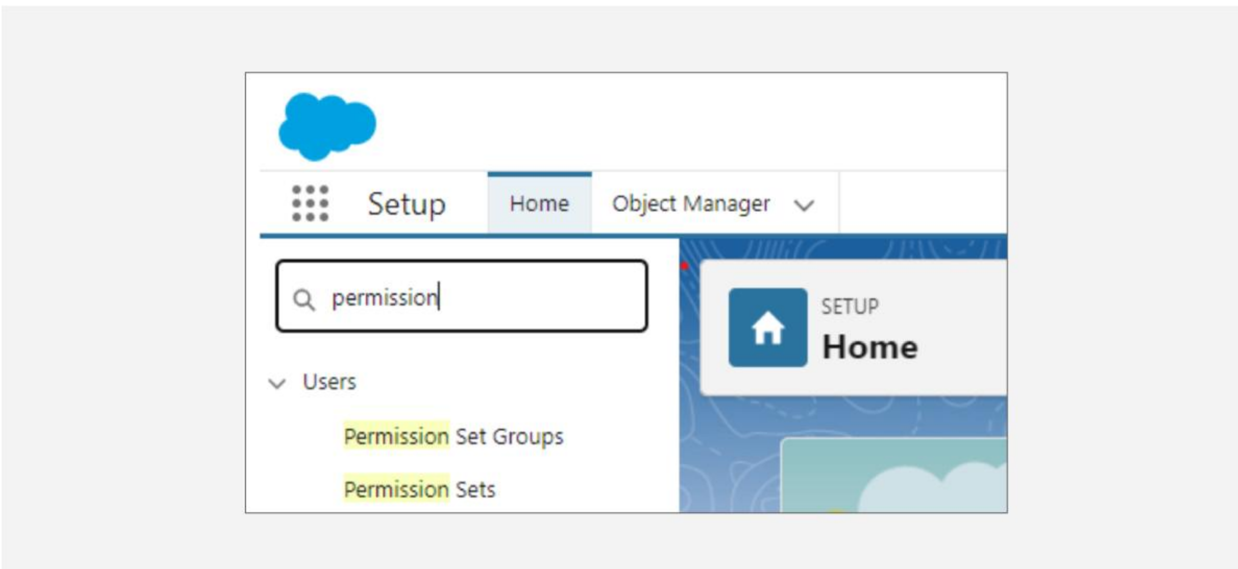
3. Nest Wealth Compliance Officer - Provides access to Nest Wealth Pro App plus compliance approval.

4. Nest Wealth Advisor - Provides access to Nest Wealth App.

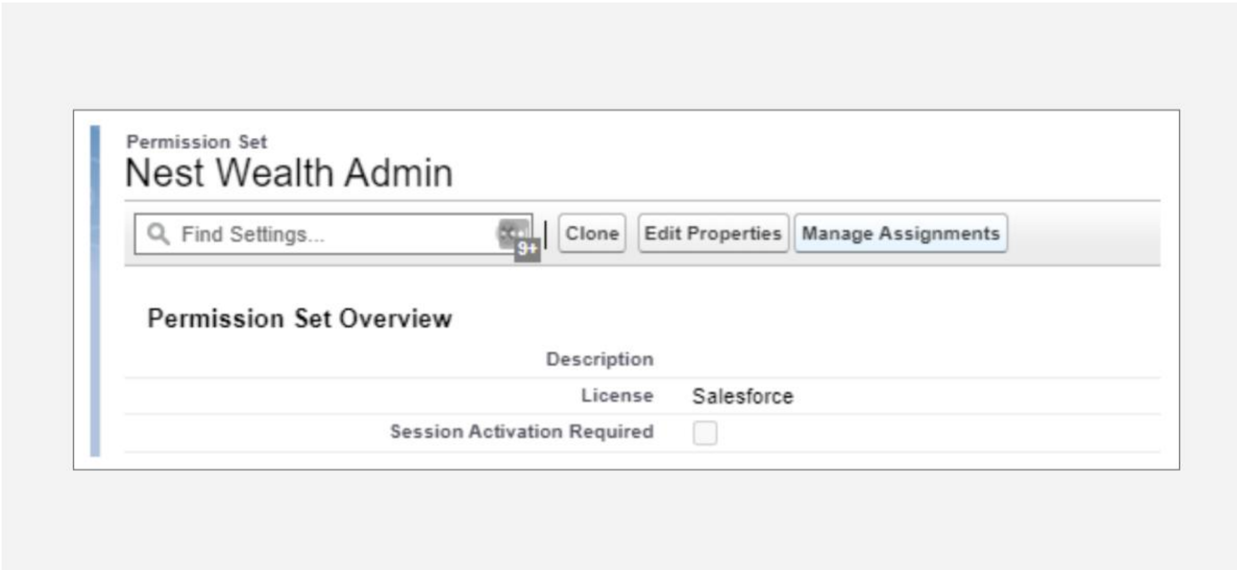
5. Nest Wealth Portal User - Provides access to the Nest Wealth Pro App through customer portal.

3.1 Managing Permission Sets

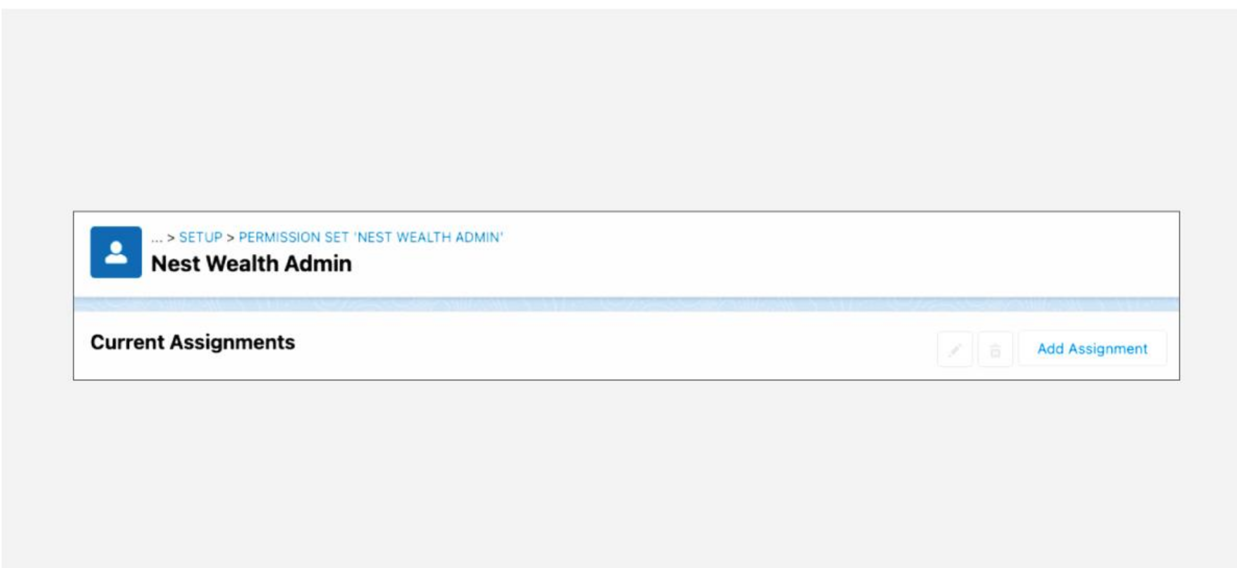
1. From the setup Home, enter Permissions into the search box.



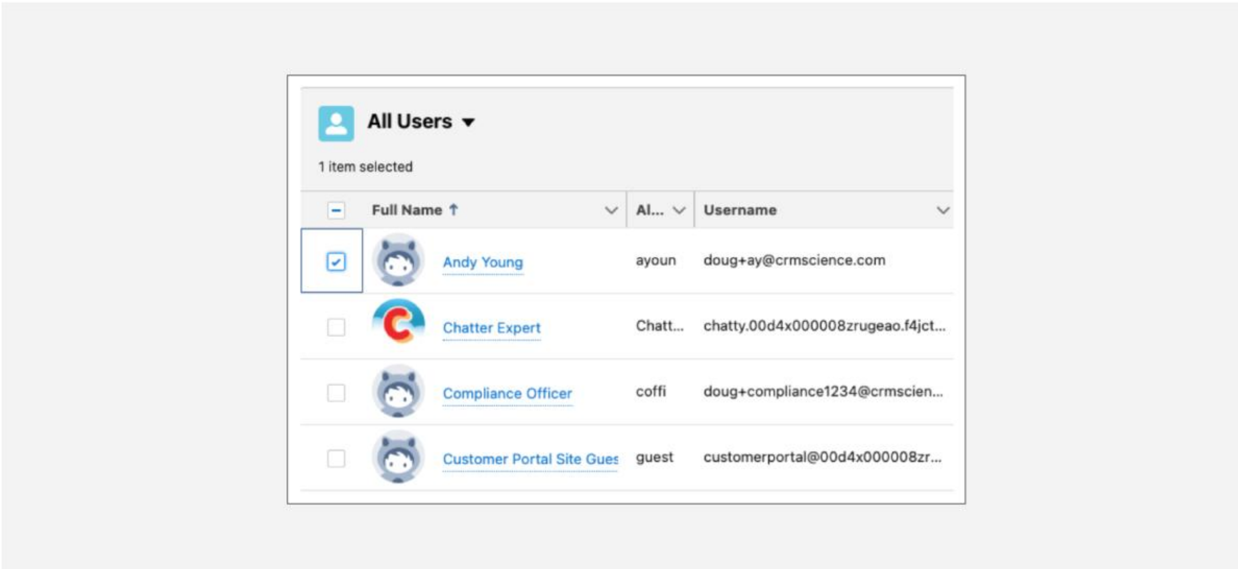
2. Select the appropriate permission set and click Manage Assignments.



3. Select Add Assignments on the next screen.



4. Check the box next to the user's name you want to assign the permission set and click Next and then Assign *(No expiration date).*

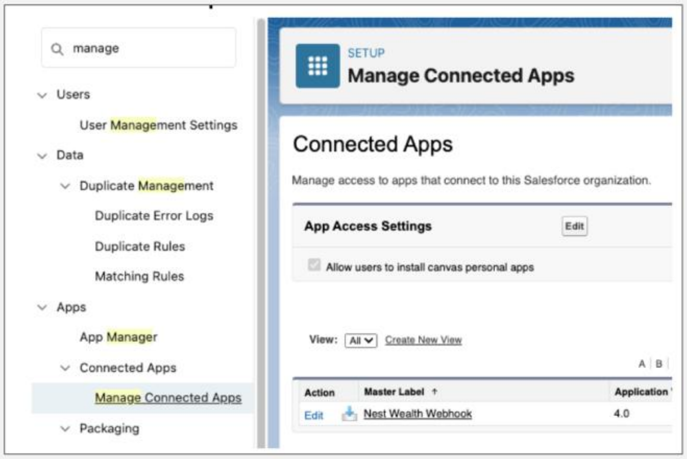


4.0 Connected App Configuration:

The Connected App allows the webhook to call the Platform Event we have packaged. This Platform Event will in turn update the Docusign Status to 'Signed'. The step below will show you how to add the Integration User as the Running User so the webhook can authorize each org.

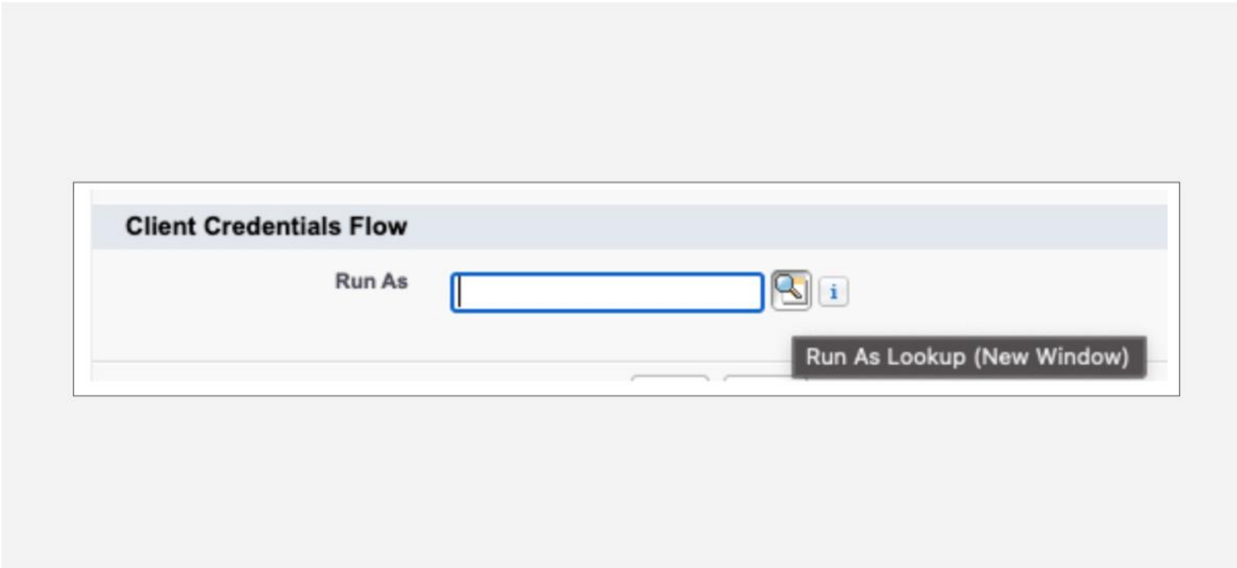
4.1 Editing The Connected App

1. From Setup type "manage" and click on Manage Connected Apps. Then select the "Nest Wealth Webhook" from the options available.

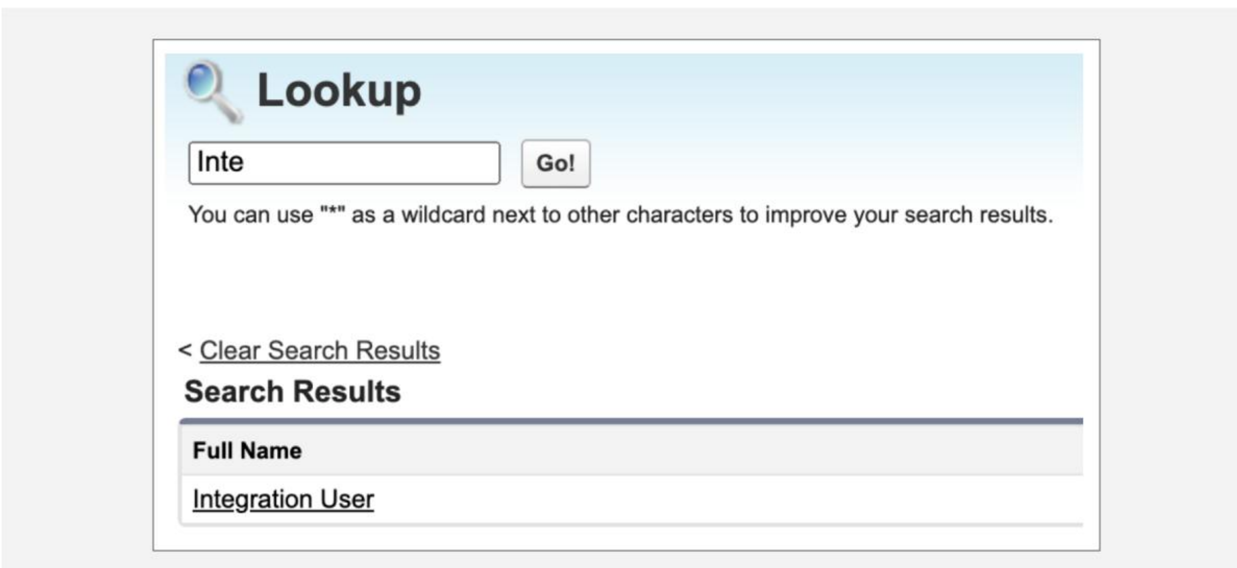


2. Then Select “Edit Policies” to configure this Connected App.

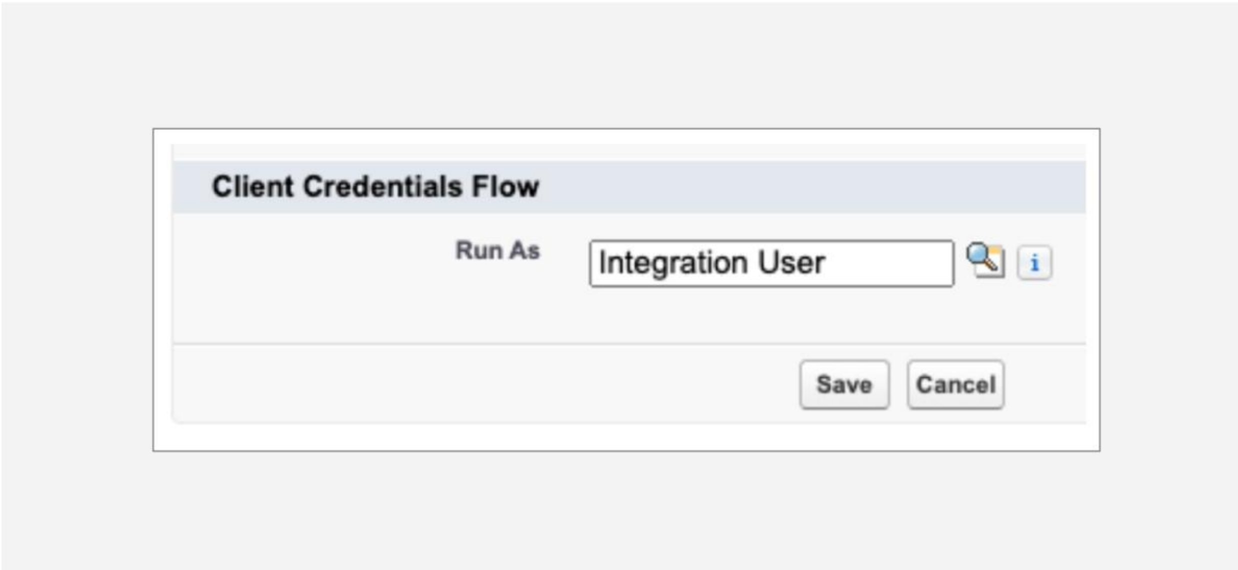
3. To add the Integration User, select the magnifying glass next to Run As at the bottom of the page.



4. Lookup and select the Integration User in the popup window.|



5. Then press **Save**.

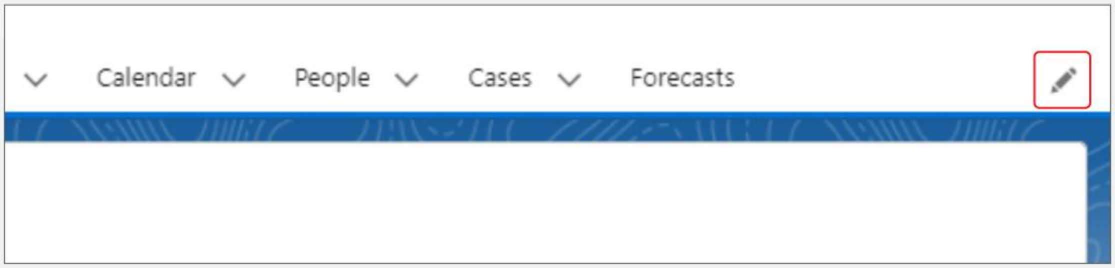


5.0 Configuration Page:

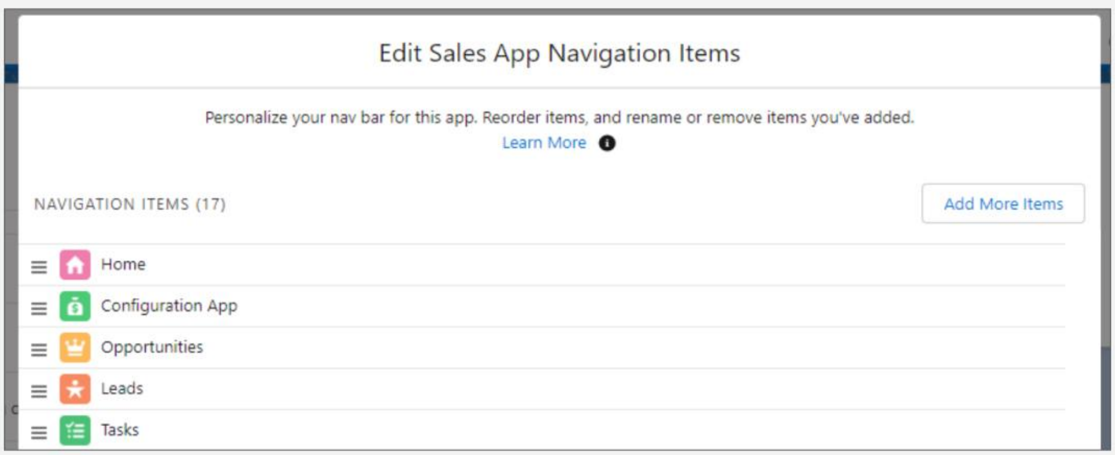
The Configuration Page allows you to enter authentication details, adjust available values for the Advisors and Map and Upload CSV files to create Contacts.

5.1 Adding the Configuration Tab

1. From the Home page click the pencil in the Upper right corner.

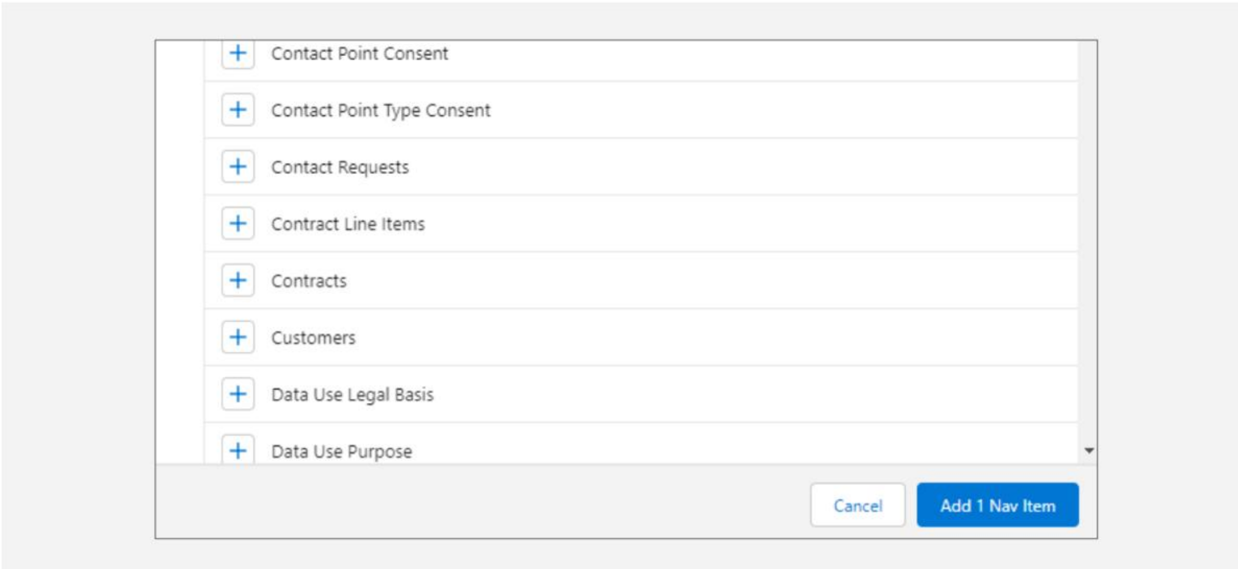


2. Click the Add More Items button.



3. Select the Configuration App and add to your Navigation.

4. Click the Save button.



5.2 Authentication Tab

The Authentication Tab allows you to enter the Quik! Username and Password as well as the Customer ID and Authentication ID for DocuSign. Additionally you also need to enter the Nest Wealth API credentials in the space provided.

5.2A Entering (Quick! Form) Authentication details

1. Enter the Customer Id, Authentication Id for DocuSign.

2. Enter the Username and Password for Quik!

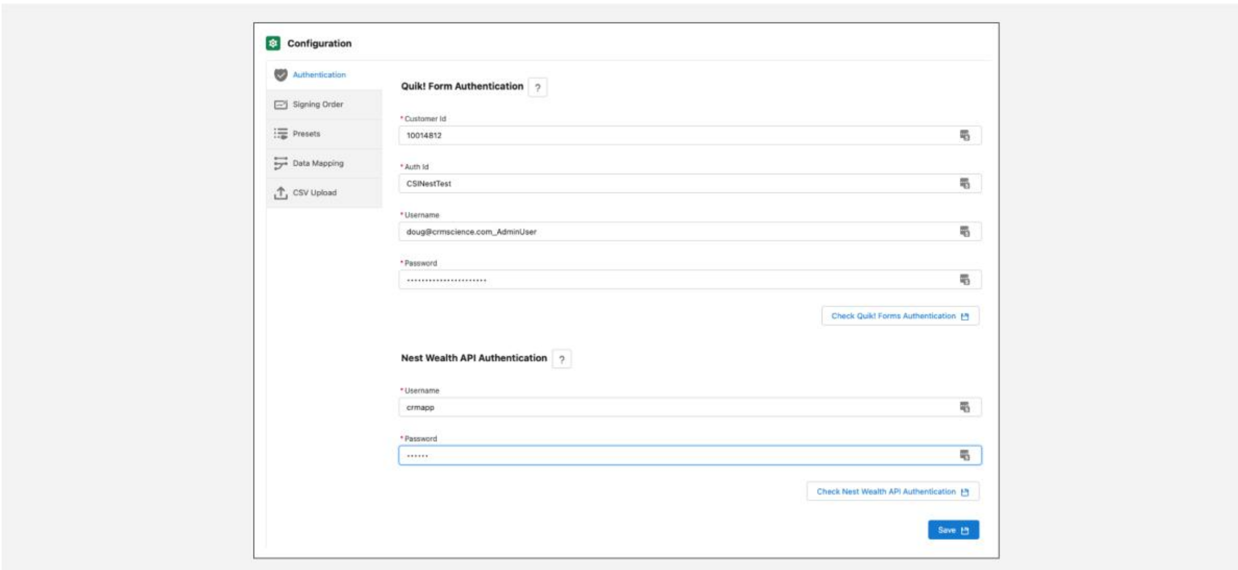
3. Press the Check Quik! Forms Authentication button to verify and save the Authentication details.

5.2B Entering Authentication details:

4. Enter the Username for Nest Wealth API Authentication

5. Enter the Password for Nest Wealth API Authentication

6. Press the **Check Nest Wealth API Authentication** button to verify and save the Authentication details.



5.3 Signing Order Tab

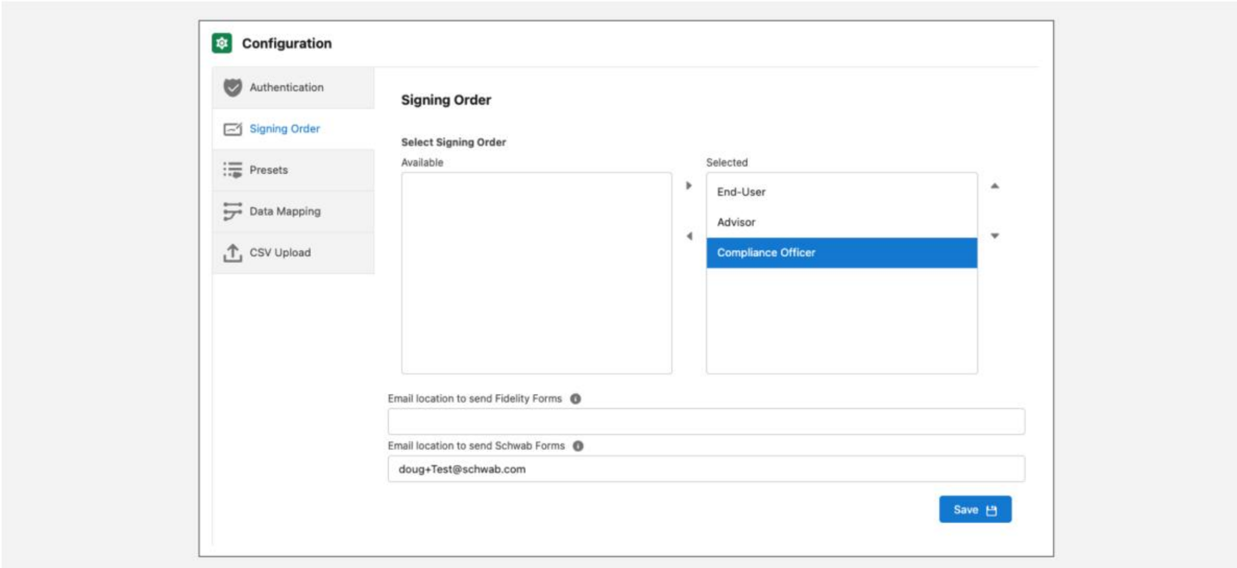
The Signing Order Tab allows the administrator to configure the roles that are responsible for signing new applications, and the order in which they need to sign.

To set the Signing Order:

1. Click on the Available roles in the box and select the arrow to move the roles to the Selected box.

2. After all the desired roles have been added, the order in which they need to sign can be set with the up and down arrows to the right of the Selected box.

3. If an docusign copy needs to be sent to Fidelity or Schwab after the application has been fully executed, enter the appropriate email address in the space provided. If the email is blank, a copy will not be sent to that custodian.



5.4 Presets Tab

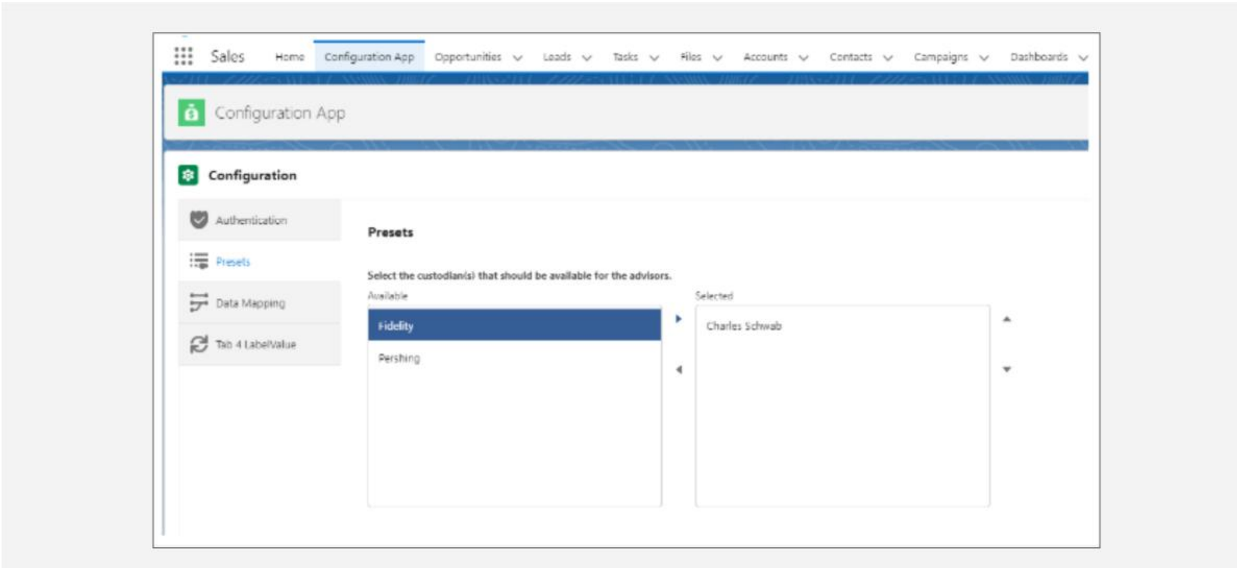
The Presets Tab allows the administrator to select values that are available to be used by the Advisors.

5.4A To set the Presets:

1. Click on the Available item in the box and Select the arrow to move the item to the Selected box.

2. Repeat the process until all of the desired items have been moved to the Selected box.

3. Click the Save button to store the selected presets.



5.5 Data Mapping Tab

The Data Mapping Tab allows you to map the header values on your CSV file to the corresponding field on the Salesforce Contact record. Map fields before attempting to upload a CSV file.

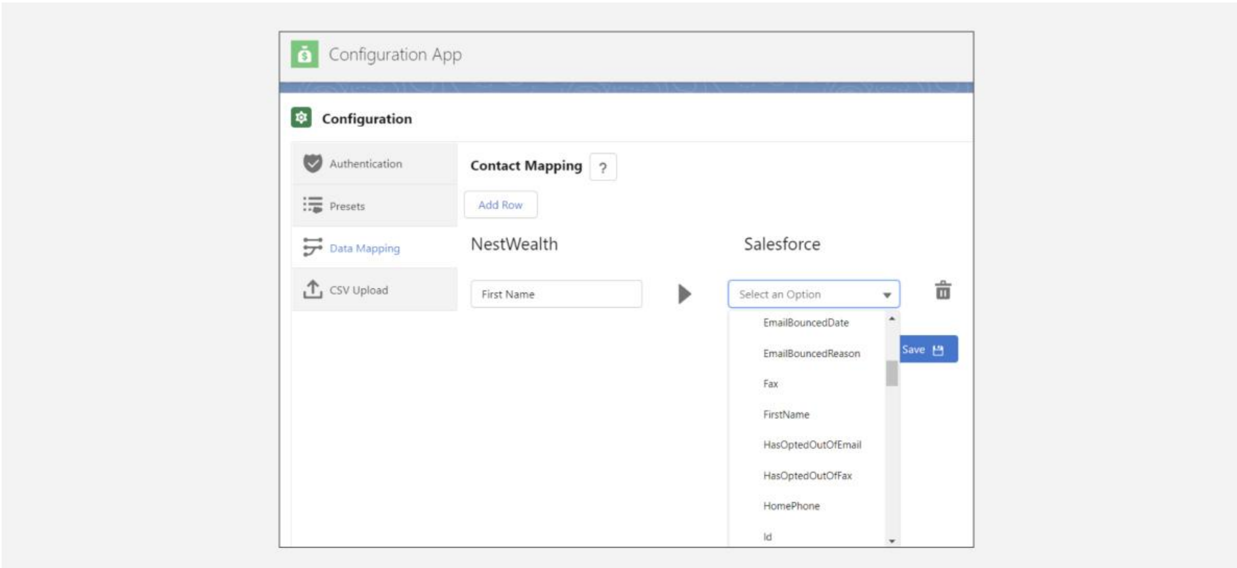
5.5A To set the Data Mappings

1. Click in the empty box in the NestWealth column and enter the column header value from your CSV file.

2. Select the dropdown arrow in the Salesforce column and select the appropriate field name.

3. Add rows as needed to map the header values on your CSV file. At a minimum fields that are required for Contact creation should be mapped.

4. Click the Save button to store the mappings.



5.6 CSV Upload Tab

The CSV uploader allows you to upload a CSV file and create Contact records in Salesforce. Header values on the CSV file must be mapped to the Salesforce fields, on the Data Mapping tab, before uploading the CSV file.

5.6A To upload a CSV file

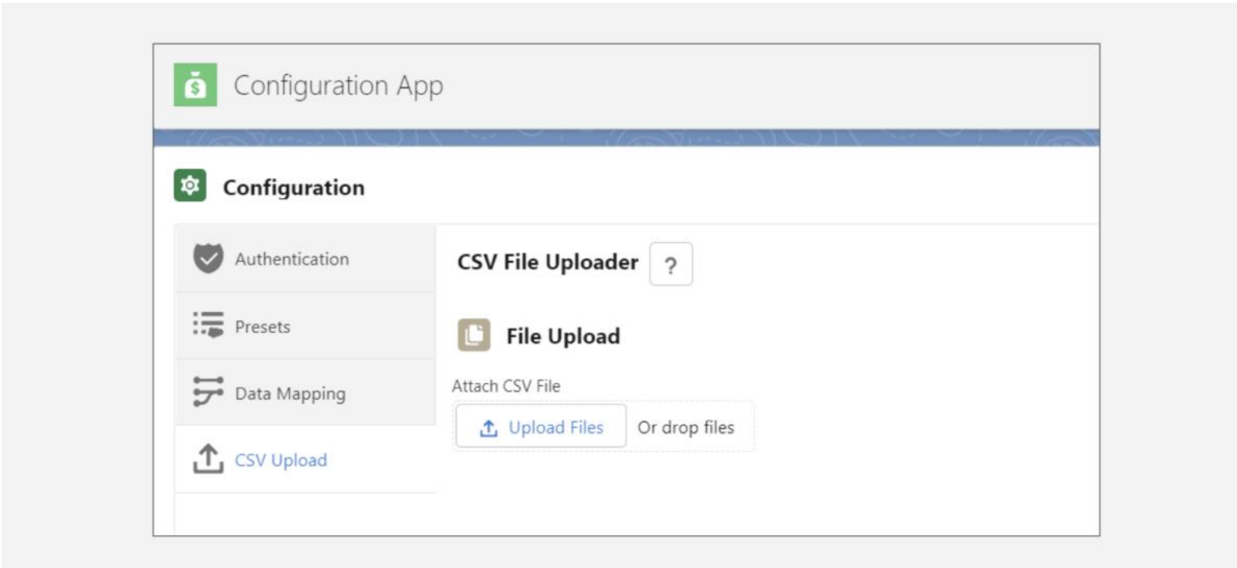
1. Click the Upload Files button.

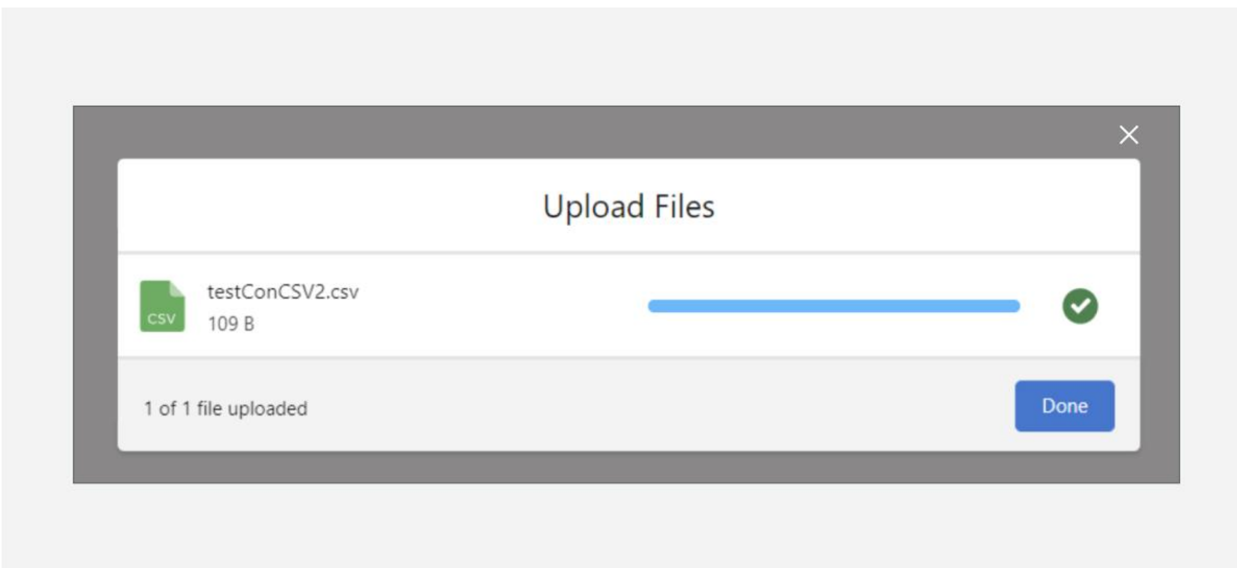
2. Select the file you would like to upload.

3. The file will automatically upload, a window showing the status will be displayed.

4. Click the Done button.

5. A message will appear if the records were successfully created.





5.7 Admin Setting Tab

The Administrator can configure the Docusign Environment with which their Quik! Account is associated. Additionally, they can change the endpoint if needed.

Update the Environment ID to the number associated below

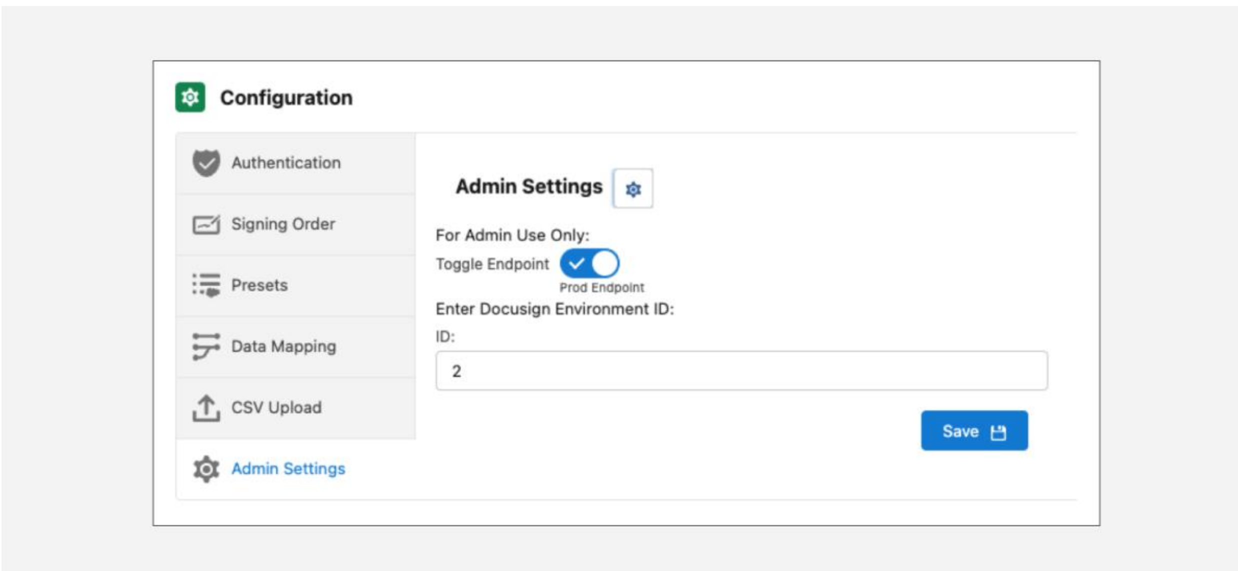
1. Production

2. Demo

Change the endpoint

If you need to switch from the production endpoint to the dev endpoint, first click on the gear icon to reveal the toggle. Then toggle to the appropriate endpoint and hit save.

NOTE: If you are using the dev endpoint this remote site setting is not packaged and will need to be manually added. Also, be sure to update the credentials on the first tab if you are switching endpoints.

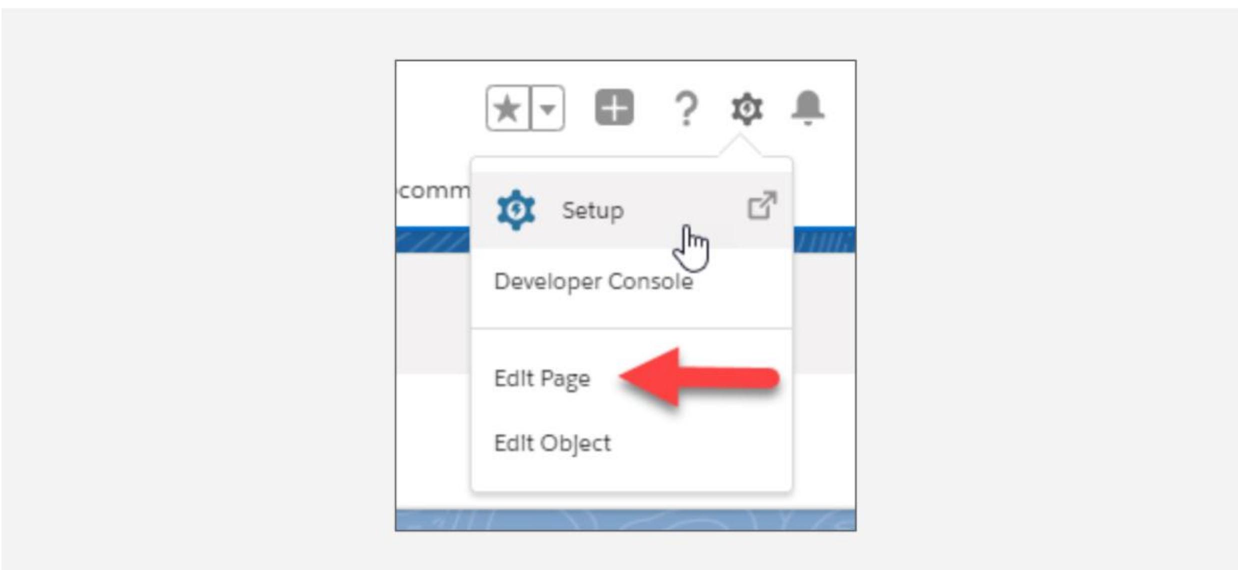


6.0 Lightning Record Page Components

A Lighting Component is available to place on the Contact Record Pages.

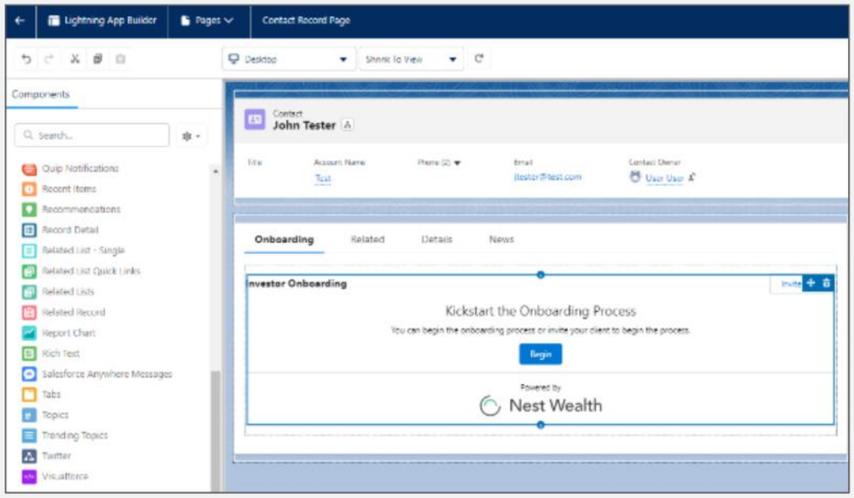
6.1 Adding Nest Wealth Onboarding

1. Go to the Lightning Page you wish to add the Lightning Component on for your users.
2. Select the grey gear at the top right corner of the screen.
3. Select the Edit Page option.



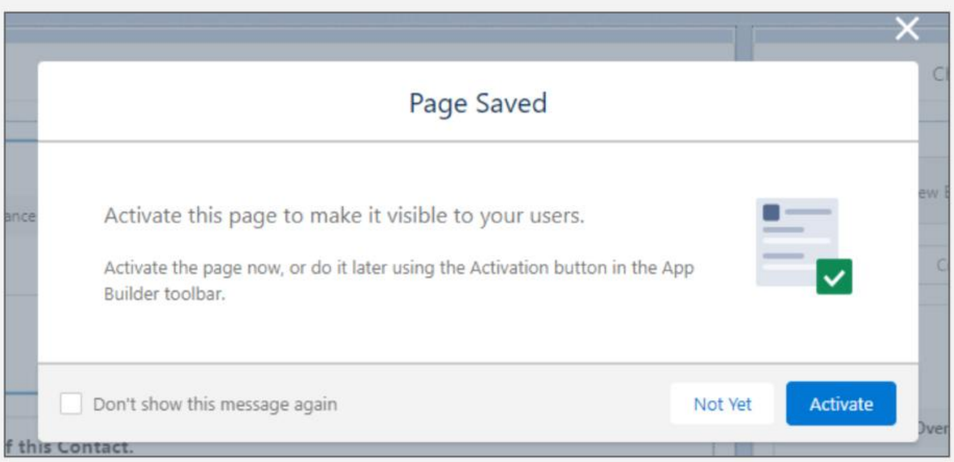
4. Scroll toward the bottom of the page on the Components sidebar.

5. Select the Nest Wealth Onboarding component and drop to the desired location on the Lightning Record Page.



6. Save the page.

7. You may need to Activate if you have never customised the page before this change.



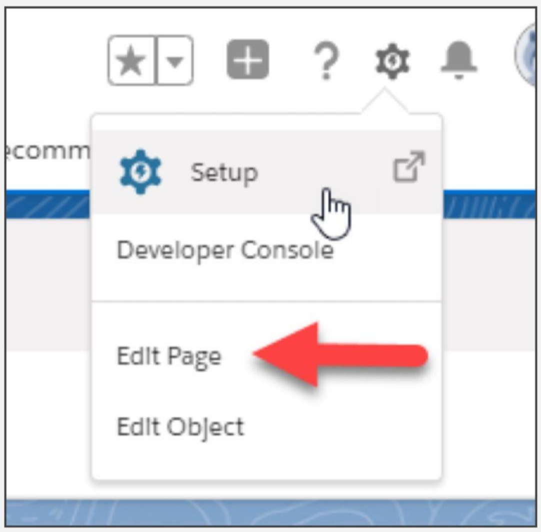
8. You will need to set the default properties for the page.

9. Save your updates.

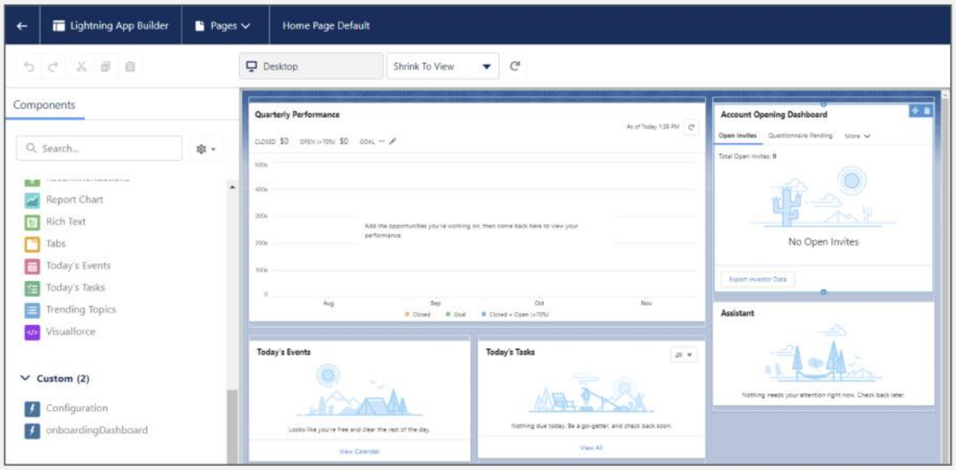
6.2 Adding Nest Wealth Onboarding Dashboard

A Lighting Component is available to place on Lightning Pages.

1. Go to the Lightning Page you wish to add the Lightning Component on for your users.
2. Select the grey gear at the top right corner of the screen.
3. Select the Edit Page option.



4. Scroll toward the bottom of the page on the Components sidebar.
5. Select the Nest Wealth Onboarding Dashboard component and drop to the desired location on the Lightning Page.
6. Save your updates.



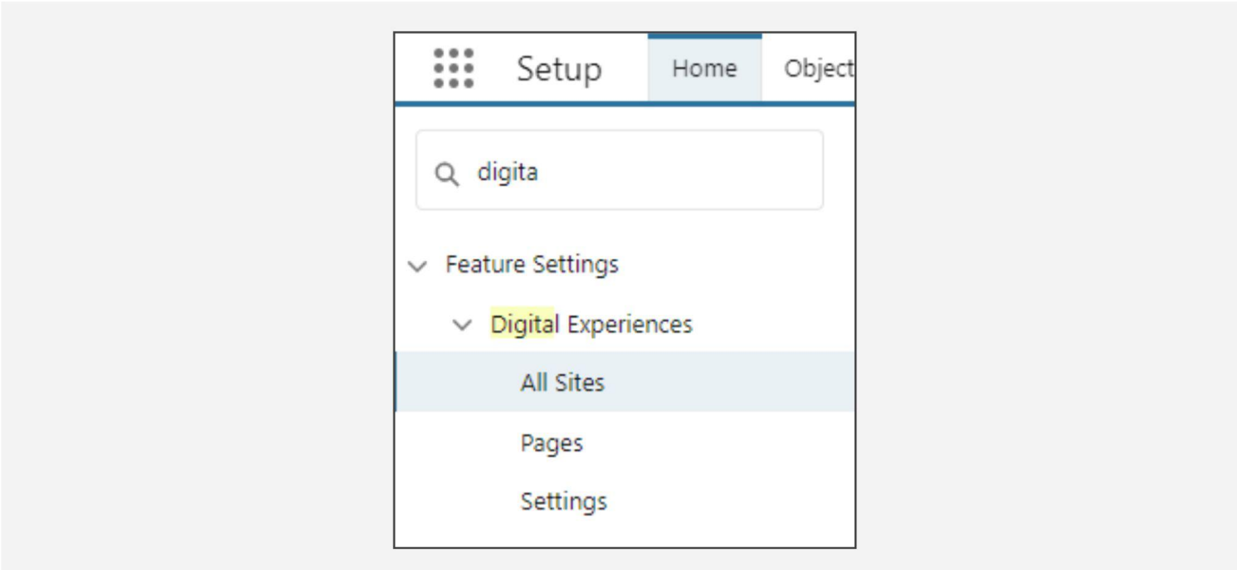
7.0 Experience Cloud Page Component

A Lighting Component is available to place on the Contact Record Pages.

7.1 Adding Nest Wealth Onboarding Component

1. In the Setup Menu type Digital Experiences into the search box.

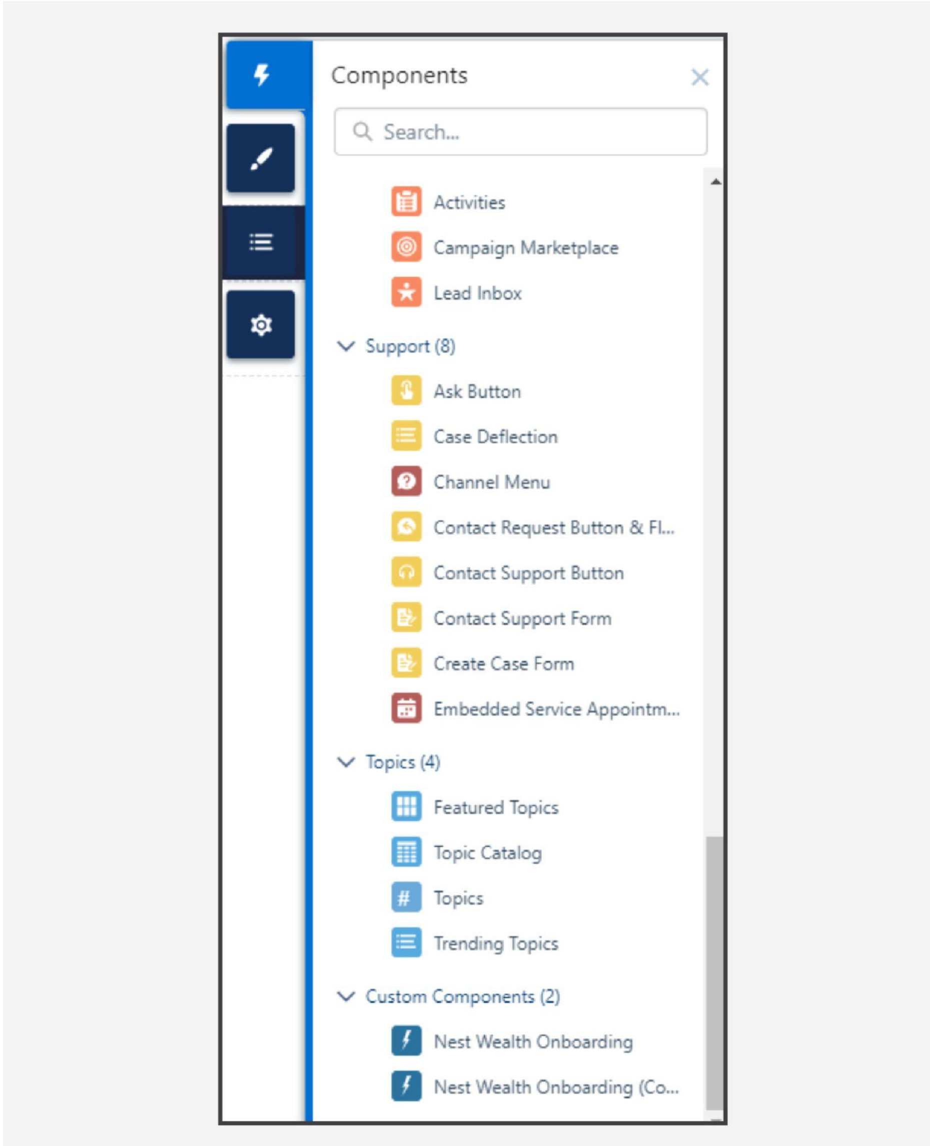
2. Select All Sites under Digital Experiences.



3. Click Builder next to the appropriate site.

4. Scroll toward the bottom of the page on the Components sidebar.

5. Select the Nest Wealth Onboarding component and drop to the desired location on the Page.



8.0 Frequently Asked Questions

TBD