

Axos for Salesforce User Guide

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Prerequisites

The functionality is currently only available in Lightning environments.

The managed package utilizes API calls to integrate your Salesforce instance with Liberty. Due to this, users who are on the Professional Edition of Salesforce may need to confirm they have API Access enabled.

App requires standard Salesforce license.

How to Install the App

1. Begin installation of the Axos for Salesforce package into your Salesforce instance by visiting our listing on the AppExchange.
2. Click **Get It Now** and follow the on-screen prompts to install the app & login to the AppExchange.
3. Specify where you want to install the app: choose either **Install in Production** or **Install in a Sandbox**.
4. Review and agree to the terms and conditions and click **Confirm and Install**.
5. Determine the level of access in which to install the package. As a best practice, we recommend selecting **Install for Admins Only**, as provisioning is then determined by permission set assignment. Click **Install**.
6. When prompted to **Approve Third-Party Access**, select **Yes, grant access to these third-party web sites**. Click **Continue**.
7. The package will now begin installing. You may see the message **This app is taking a long time to install**. In this instance, you will receive an email when installation is complete.

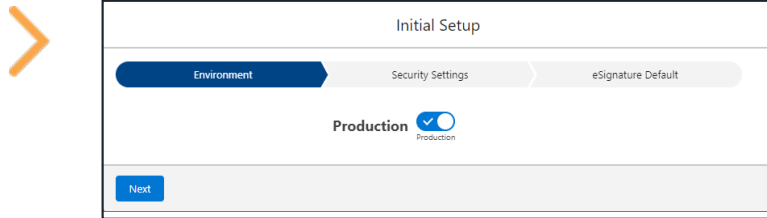
Configuring Permissions

The managed package is installed with the following Permission Sets that you can use to manage access and permissions.

- **Axos Base Permissions**
 - This permission set is required for all users to access the managed package. This permission set contains all basic functionalities, including read access to the Org Configurations component located in the Axos Configurations tab.
- **Axos Org Configurations Permissions**
 - This permission set will grant the user edit access to the Org Configurations component located within the Axos Configurations tab. This permission is required to make changes to the Field Mapping, the eSignature Settings, and the Security Settings.

Initial Setup

The Initial Setup screen is viewable to any users with both permission sets assigned when first accessing the App.



1. Environment

a. Select which Liberty environment to connect to - **Production** or **QA**.

i. **Production** = If you're ready to engage with your Client's real data.

ii. **QA** = If you are only testing the solution, and do not want to impact your Client's real data.

NOTE: You must receive QA specific credentials from Liberty in order for this option to be functional.

2. Security Settings

a. Input the Client ID & Client Secret to establish the connection to Liberty. See the *Security Settings* section below for more information.

3. eSignature Default

a. Set the default value for the eSignature toggle within the Create Account button. See the *eSignature Settings* section below for more information.

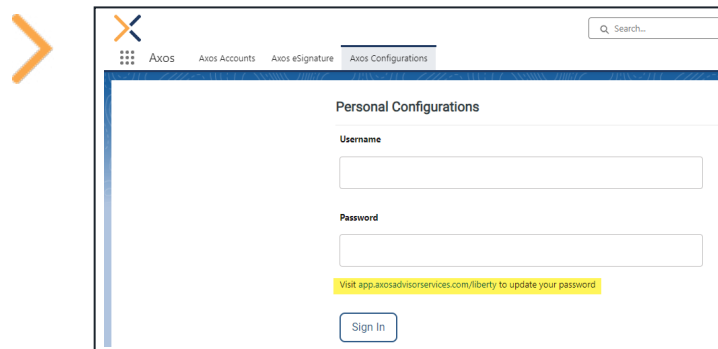
Axos Configurations Tab

The Axos Configurations tab contains both the Personal Configurations component and the Org Configurations component of the package.

Personal Configurations

This is the component you will use to add your Liberty credentials - these credentials control which Accounts are displayed on the Axos Accounts Tab.

If you have forgotten your password or need to reset your credentials, please use the link highlighted in the image below.



Any updates to the credentials in Liberty must always be reflected in this component to prevent access issues.

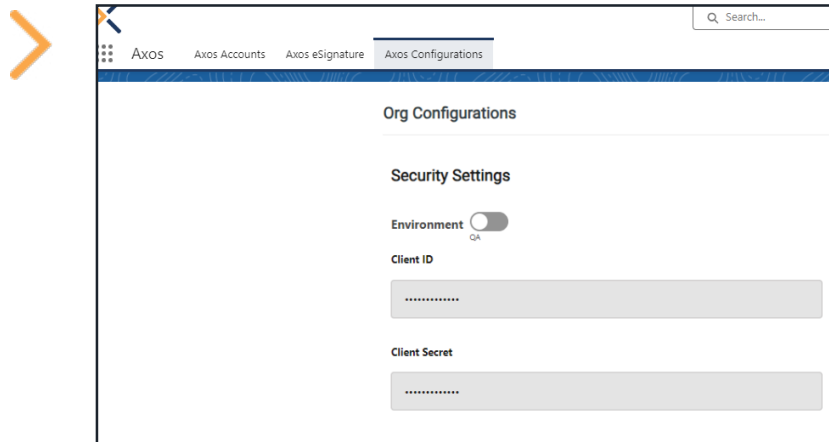
NOTE: Liberty's password policies requires users to change their password every 90 days.

Org Configurations

This component has three core functionalities: the Security Settings, the Field Mapping for Account Creation Prefill, and the eSignature Settings. To make changes to these components, the **Axos Org Configurations Permissions** Permission Set must be assigned to the user.

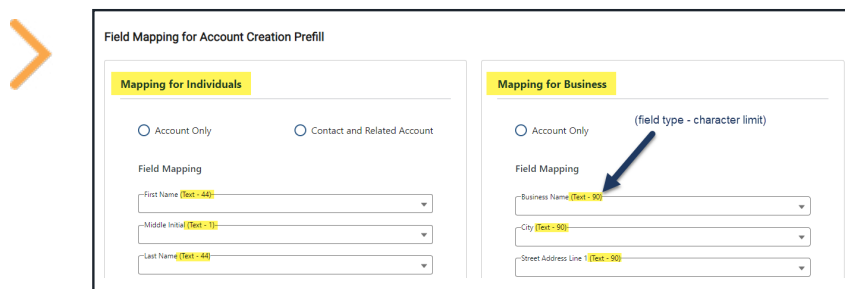
The **Security Settings** contain the Client ID & Client Secret; these are used for the OAuth authentication protocol and returns a session token that the API call uses for security purposes. This is an org-wide setting that will need to be properly configured for the package to integrate with Liberty.

To receive the Client ID & Client Secret, please fill out the [Third-Party Export Request Form](#) and then contact your Client Service Advocate.



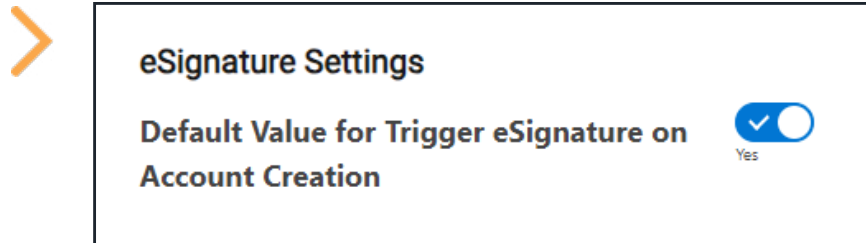
When changing the value of the Liberty Environment selection, both the Client ID & Client Secret as well as the credentials will need to be updated to properly redirect the API calls to the desired instance.

The **Field Mapping for Account Creation Prefill** is split into fields for Individuals and fields for Business. The mapping in this component controls how the Lookup Field within the Create Account Button will populate the data on that screen from your existing Salesforce record. The Field Mapping must be properly set up to utilize the Lookup functionality.



NOTE: The field selected must have a data type that matches the field type in Liberty. If the data within the field goes beyond the character limit, it will be truncated within the Account Creation screen.

The **eSignature Settings** gives the option to set the default value for the 'Trigger eSignature' toggle located within the Create Account button. The value set here is for convenience. However, it can be overridden on the Create Account button as needed.



Overview of Axos Accounts Tab

This is a tab that will display the Accounts and data from Liberty. If the data on this screen needs to be updated, the change will need to be made in Liberty itself and will then be reflected on this screen. You can expect to find 25 of the most recently created Accounts from Liberty listed here.



The magnifying glass icon and search bar allows you to filter through the list of displayed Accounts. To narrow down the displayed Accounts, you can search by Account Name, Account Number, SSN, or TaxID/EIN. Type the value you would like to search for in the search bar, then hit 'Enter' on your keyboard.

To clear your search, delete the text in the search bar, then hit 'Enter' on your keyboard.



The circular arrow icon is available to refresh the displayed data on the screen. If an update has been made to the Account data in Liberty, you may need to use this icon to properly display these changes.

Create Account Button

This button can be used to create new Accounts that display within Liberty and enables you to capture data from existing Salesforce records. The Account Type dropdown field will dynamically display a form with the required fields to populate for either an Individual or a Business.

Prefill using Lookup Field

The lookup field on the Account Creation screen allows you to use existing data in your Salesforce instance to fill out the form. You will need to properly configure the Field Mapping for both the Individual and the Business, located on the Axos Configurations tab, to use this feature.

If the values passed into the field appear to be cut off, it may be because they exceed the character limit for this field. The expected behavior is that the values will be truncated in order to prevent any errors from occurring.

Trigger eSignature

This toggle allows the user to initiate an eSignature document for the Account that is created. The proper permissions and credentials must be configured for the Liberty user to use this functionality.

When the value is set to Yes, the next screen prompts the eSignature Steps, in which the Form & Recipients are to be selected. Once the envelope has been sent, it can be tracked in the Axos eSignature tab.

Representatives

This section allows a Representative to be selected for the Account. If the logged in user is a Representative, this user will be assigned by default and the selection will not be available.

For a list of Representatives to appear, you must enter a value in the search box. To see the complete list of Representatives, click the 'Search' button without entering a value in the search bar.

Account Detail Screen

When clicking on the Account Number field within the Axos Accounts tab list view, it will display the Account Detail screen. This is where you can view any additional Account data. All the data on this screen is static, so if updates are required, they must be made in Liberty.

Axos eSignature Tab

When utilizing an eSignature product like DocuSign with your Liberty account, an Envelope is created to hold the data on the document to be signed, the recipients, statuses, etc. This tab gives insight into the envelopes that were created with the DocuSign account associated with the Liberty login configured in the Axos Configurations tab.

If a non-completed envelope needs to be re-sent, you can select the 'Resend' button located in the Actions column.

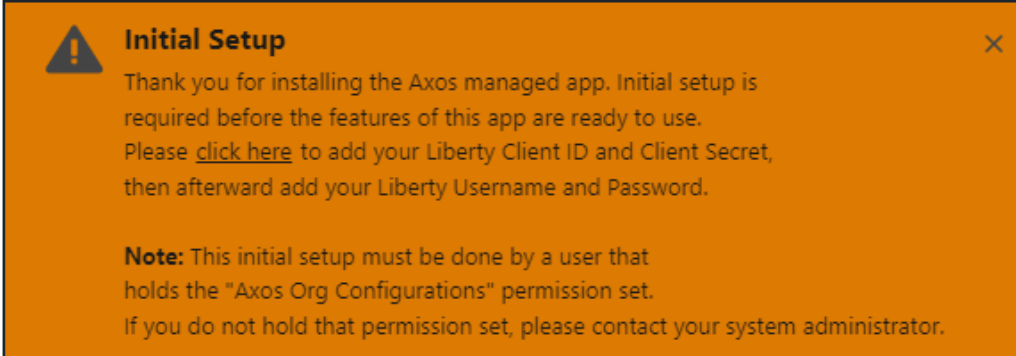
Troubleshooting

For any additional inquiries about the resolutions below, please contact your Client Service Advocate.

Initial Setup Message

Issue: The managed package Setup has not yet been completed.

Resolution: The Client ID and Client Secret need to be configured in the Axos Configurations tab, under Org Configurations > Security Settings. See the Org Configurations section above for more information.



The image shows a notification box with an orange background and a white border. On the left side, there is a large orange chevron pointing right. Inside the box, on the left, is a small blue triangle with a white exclamation mark. To the right of this icon is the title "Initial Setup" in bold black text. Below the title is a paragraph of text: "Thank you for installing the Axos managed app. Initial setup is required before the features of this app are ready to use. Please [click here](#) to add your Liberty Client ID and Client Secret, then afterward add your Liberty Username and Password." Below this paragraph is a "Note" section: "**Note:** This initial setup must be done by a user that holds the 'Axos Org Configurations' permission set. If you do not hold that permission set, please contact your system administrator." In the top right corner of the box, there is a small grey 'X' icon for closing the notification.

Missing Permission Message

Issue: The Liberty user configured on the Axos Configurations tab is missing one of the following permissions:

- Create Accounts
- View eSignature Envelopes
- Create eSignature Envelopes

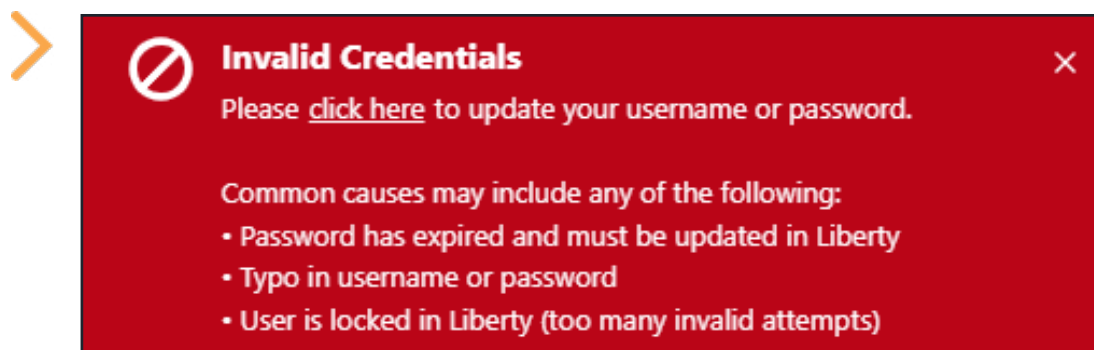
Resolution: The Client ID and Client Secret need to be configured in the Axos Configurations tab, under Org Configurations > Security Settings. See the Org Configurations section above for more information.



Invalid Credentials Error

Issue: The credentials used in the managed package do not match what is set within Liberty, or the account has been locked from multiple login attempts.

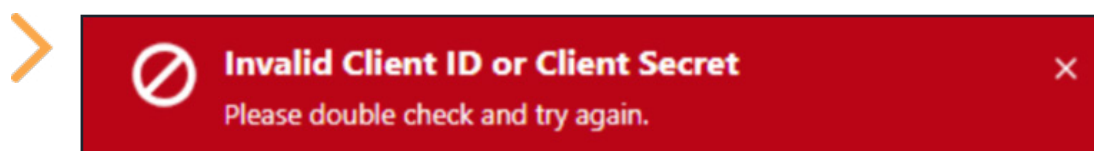
Resolution: Use the link in the error message or navigate to the Axos Configurations tab to update your credentials within the Personal Configuration component. If needed, you can reset your Liberty password here: <https://app.axosadvisorservices.com/liberty>



Invalid Client ID or Client Secret Error

Issue: The Client ID or Client Secret are returning an error when being passed to Liberty.

Resolution: Update the Client ID and/or Client Secret in the Security Settings section of the Org Configuration component located on the Axos Configurations tab. If you are having trouble, please contact your Client Service Advocate.



Account Missing from Axos Accounts

Issue: The Account is visible in Liberty, but is missing from the Axos Accounts tab.

Resolution #1: Ensure that the credentials in the Axos Configurations tab match the user login details in Liberty. If an update is needed, update the credentials in the Personal Configuration section of the Axos Configurations tab.

Resolution #2: There is a display limit of 25 Accounts that are sorted by the most recently created records. Use the magnifying glass icon and search bar to query for the Account Number.

Liberty Application Requires Consent to use DocuSign

Issue: The eSignature request could not be completed because DocuSign's authentication standards require each user to consent to view envelopes within Liberty.

Resolution: Navigate to Liberty & grant consent via this link:

<https://app.axosadvisorservices.com/liberty/desktop/docusignEnvelopeView.jsf>

Generic 'Error' Message

Issue: A generic message may present itself, which could be due to the VPN disconnecting, low internet connectivity, IP restrictions, or browser caching.

Resolution #1: Navigate to another page within Salesforce to see if it loads properly. If not, verify that your internet connection and any VPNs are working properly.

Resolution #2: Refresh the page. If the issue persists, clear your browser cache & cookies, then try again.

If you need any assistance or have any questions, please reach out to your Client Service Advocate.

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