

# Axos for Salesforce

Now Available

Axos for Salesforce managed package is now available on the Salesforce AppExchange.

Initiate the opening of Axos Advisor Services accounts directly within your Salesforce instance. This package offers seamless data integration with Liberty via our Axos Advisor Services Liberty APIs and allows you to view up to 50 accounts in a single, centralized location. Throughout 2024 and beyond, we will be launching a suite of powerful features aimed at enhancing your client experience and improving operational efficiency. Stay tuned for further updates and details.

## Account Creation

- Push Salesforce contact data to open new accounts in Liberty.
- Map personal organization data to prefill forms when creating an account.
- Retrieve account numbers immediately in Salesforce for inclusion in client records.
- Send eSignature forms for a digital client experience.

## Data Retrieval

You can view up to 50 accounts at one time or search for any accounts associated with the logged-in user and check their status (e.g., Pending, Open, Active, etc.). Please note that the account data is currently view-only and not stored within Salesforce, meaning it won't appear in your reports or dashboards.

## Getting Started

We will work closely with you and your team to provide the necessary integration credentials to get you started. The functionality is currently available in Lightning environments and for users with a standard Salesforce license. The managed package utilizes API calls to integrate your Salesforce instance with Liberty. Therefore, users may need to confirm that they have API Access enabled.

To begin the integration process, please contact your Client Service Advocate.

## Additional Resources

[Axos for Salesforce Frequently Asked Questions](#)

[Axos for Salesforce User Guide](#)

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**Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

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