

# Axos for Salesforce

## Frequently Asked Questions

### Axos for Salesforce

#### What is the Axos for Salesforce Managed Package?

Axos for Salesforce empowers you to 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.

#### Account Creation

- Push Salesforce contact data to open new accounts in Liberty.
- Map personal organization data to prefill forms when creating an account.
- Account numbers are immediately returned to Salesforce for inclusion in client records.
- Forms can be sent out for eSignature 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.*

#### How it Works

#### What version of Salesforce is needed to access Axos for Salesforce?

The functionality is currently only available in Lightning environments. 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.

#### What Salesforce License Type is needed to access Axos for Salesforce?

The functionality is currently only available for users with the Standard Salesforce License.

#### What is the process for installing and using the Axos for Salesforce Managed Package?

The Axos for Salesforce app can be installed by visiting the AppExchange website and searching for Axos for Salesforce. The app requires obtaining Liberty API credentials for proper integration. If you do not already have existing Liberty API credentials or are unsure, please reach out to your Client Service Advocate for assistance.

#### What resources are available to assist with setting up Axos for Salesforce?

Please refer to the Axos for Salesforce User Guide for detailed instructions.

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

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## Is there ongoing maintenance needed for Axos for Salesforce?

No, any updates or enhancements to our managed package will update automatically.

## Support

### Get Started

Please contact your Axos Client Service Advocate to obtain your Client ID and Secret in advance of beginning the installation, these are required to complete the setup process.

### Questions or Issues?

For assistance with installation and setup, or for any additional questions, please contact your Client Service Advocate.

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