# Axos for Salesforce

## Frequently Asked Questions

## Axos for Salesforce

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

Axos for Salesforce empowers you to efficiently manage your Axos Advisor Services accounts directly within your Salesforce instance. With seamless account creation and management, streamlined data integration, and connectivity to Liberty via Axos Advisor Services Liberty APIs, this solution simplifies workflows and enhances productivity for our clients.

**Effortless Data Retrieval**

| Feature | Description |
|---|---|
| Document Access | Easy access to Statements, tax forms, trade confirmations, and delivery preferences. |
| Fee Schedules | Quickly view fee schedules and associated account families. |
| Account Overview | Account details, including trade confirmations, document delivery settings, trusted contacts, TOD beneficiaries, and contribution authorizations. |
| Account Management | View up to 50 accounts at a time or search for accounts associated with the logged-in user and check their status (e.g., Pending, Open, Active, etc.). |

**Streamlined Account Creation**

| Feature | Description |
|---|---|
| Salesforce Integration | Push Salesforce contact data to open new Liberty accounts. |
| Data Mapping | Map personal organization data to prefill forms when creating an account. |
| Real-Time Account Updates | Account numbers are immediately returned to Salesforce for inclusion in client records. |
| Digital Client Experience | Forms can be sent out for eSignature for a seamless digital process. |

**Convenient Account Management**

| Feature | Description |
|---|---|
| Bi-Directional Data Flow | Ensure data accuracy through seamless synchronization between Salesforce and Liberty, enabling real-time updates and consistency across platforms. |
| Account Overview & Transactions | View holdings, transfer in assets, and setup one-time or systematic contributions. |
| Beneficiary Management | Create, add, remove, or update account beneficiaries as needed. |
| Notifications & Bulletins | View pending Liberty Message Center notifications and manage bulletins, including viewing and removing them. |
| Account Contact Updates | Update account contact information; *changes apply to all accounts associated with the same Social Security Number.* |

## 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 a Standard Salesforce License or a Salesforce Platform 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 Services 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.

## Is there ongoing maintenance needed for Axos for Salesforce?
No, any updates or enhancements to our managed package will be applied automatically, and you'll receive a notification in advance. However, we recommend verifying your field mapping settings to ensure the correct information will be prefilled when using the record lookup.

## **Support**
## Get Started

Please contact your Axos Client Services 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
If you need assistance with installation and setup or have any additional questions, please contact your Client Services Advocate.