

Wealth Access Widget Integration for Salesforce

Setup Guide and Code Manual

Building the Wealth Access Lightning Resources in Your Institution's Salesforce Environment

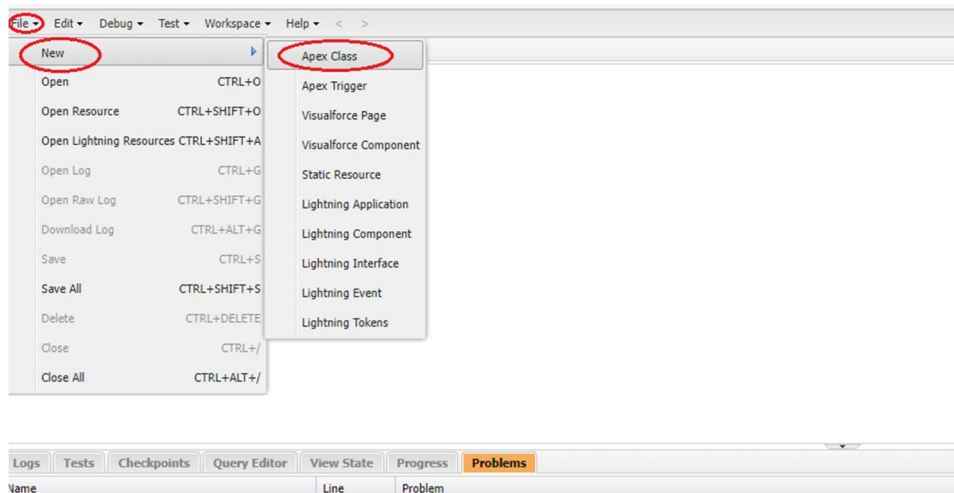
Each of the Lightning resources listed below will be created within the Developer Console of your Salesforce application. We encourage the use of a partial copy or full production Salesforce sandbox for creating the various Lightning resources, coding, and testing.

To start building, select the Developer Console from the Setup menu in the upper right corner of your Salesforce application (Gear Icon).

Create a New Apex Class

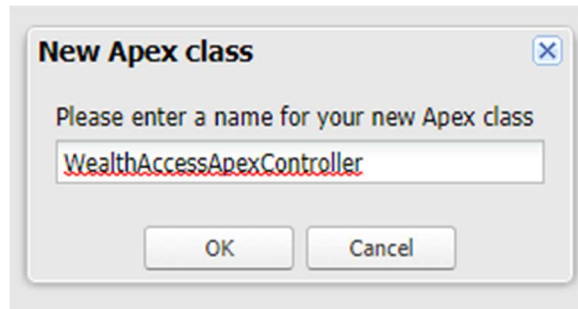
To create a new Lightning Apex Class within the Developer Console, open the File menu, select New and then select Apex Class. To utilize the code directly as provided in the appended code manual, please name the new Apex Class - WealthAccessApexController.

1)



2)

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3)



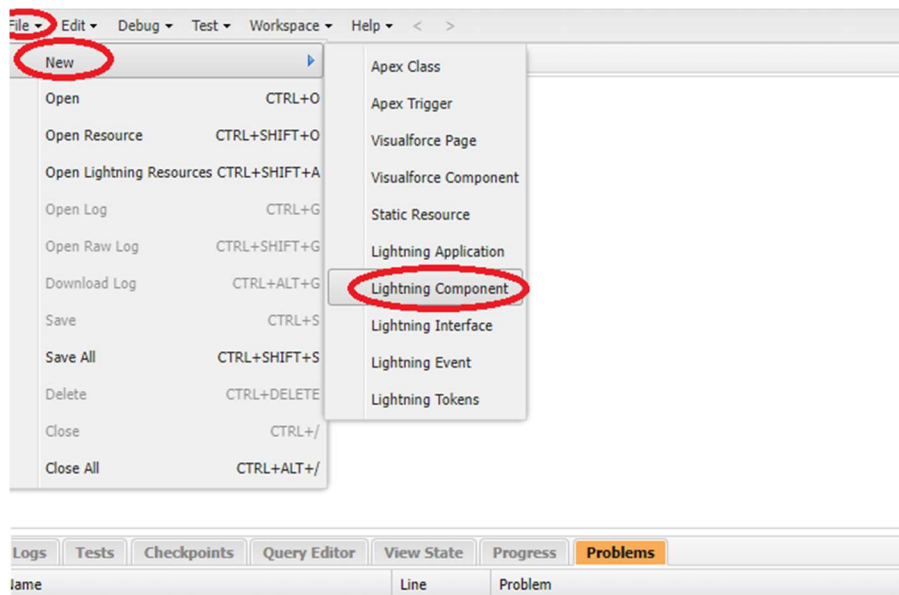
Create a New Lightning Component for Investor-Level Wealth Access Widgets

Remaining within the Developer Console, create a new Lightning Component by opening the File menu, selecting New and then Lightning Component. To utilize the code directly as provided in the appended code manual, please name the new Lightning Component - WealthAccessWidget. No component configuration options are required for creation of this component.

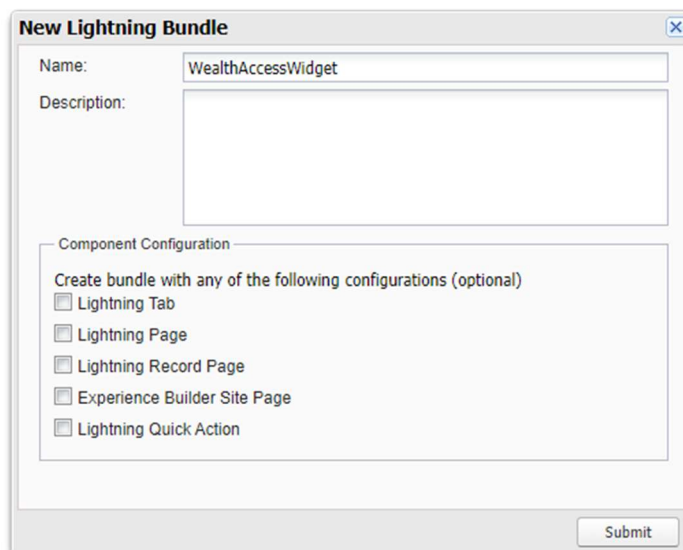
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1)



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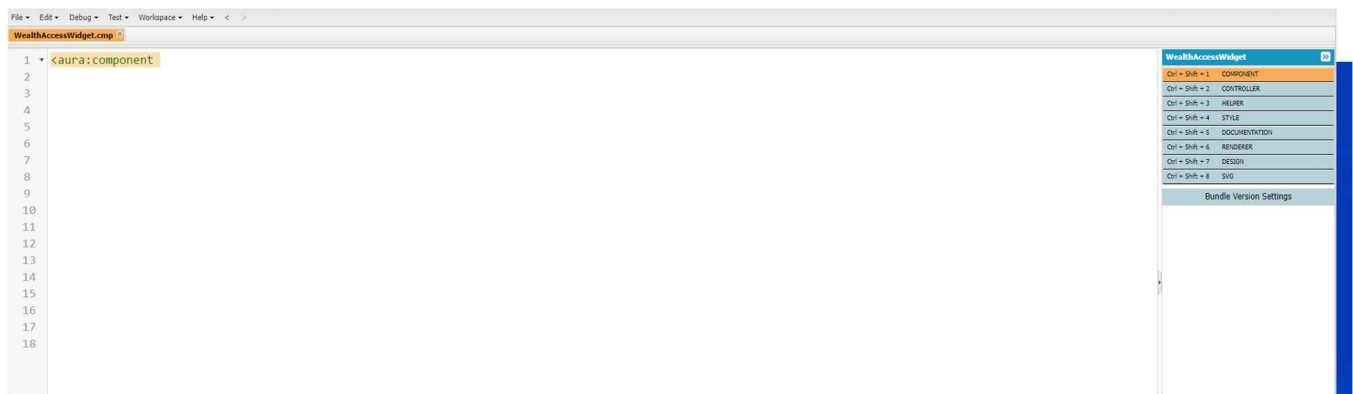
The screenshot shows the 'New Lightning Bundle' dialog box. The 'Name' field is filled with 'WealthAccessWidget'. The 'Description' field is empty. The 'Component Configuration' section is expanded, showing a list of configurations with checkboxes. The 'Submit' button is at the bottom right.

Name	Description
Name:	WealthAccessWidget
Description:	
Component Configuration	
Create bundle with any of the following configurations (optional)	
<input type="checkbox"/>	Lightning Tab
<input type="checkbox"/>	Lightning Page
<input type="checkbox"/>	Lightning Record Page
<input type="checkbox"/>	Experience Builder Site Page
<input type="checkbox"/>	Lightning Quick Action
Submit	

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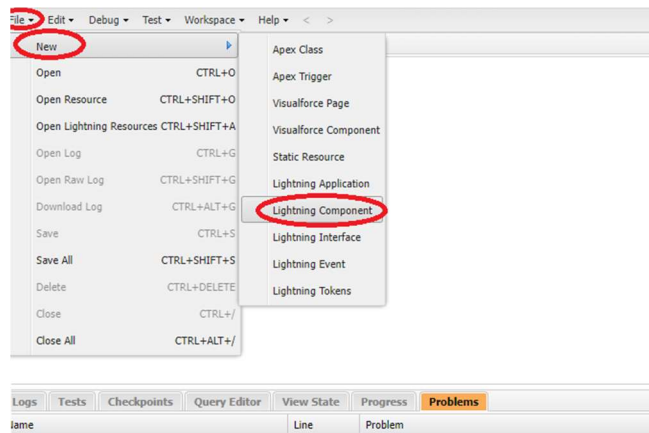
3)



Create a New Lightning Component for Advisor-Level Wealth Access Widgets

Remaining within the Developer Console, create a new Lightning Component by opening the File menu, selecting New and then Lightning Component. To utilize the code directly as provided in the appended code manual, please name the new Lightning Component - WealthAccessAdvisorWidget. No component configuration options are required for creation of this component.

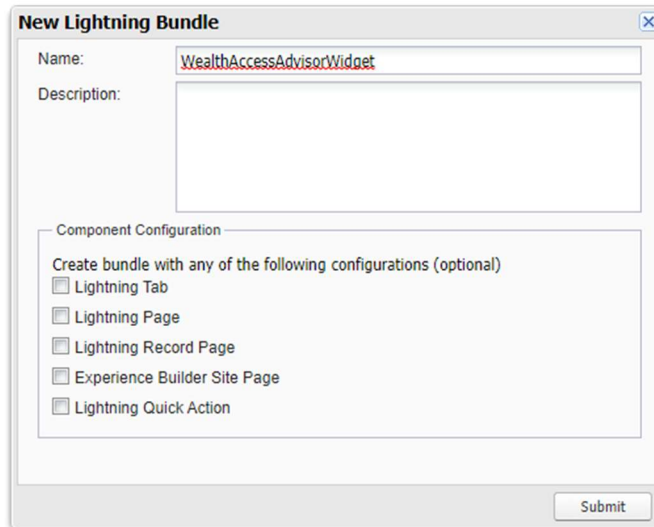
1)



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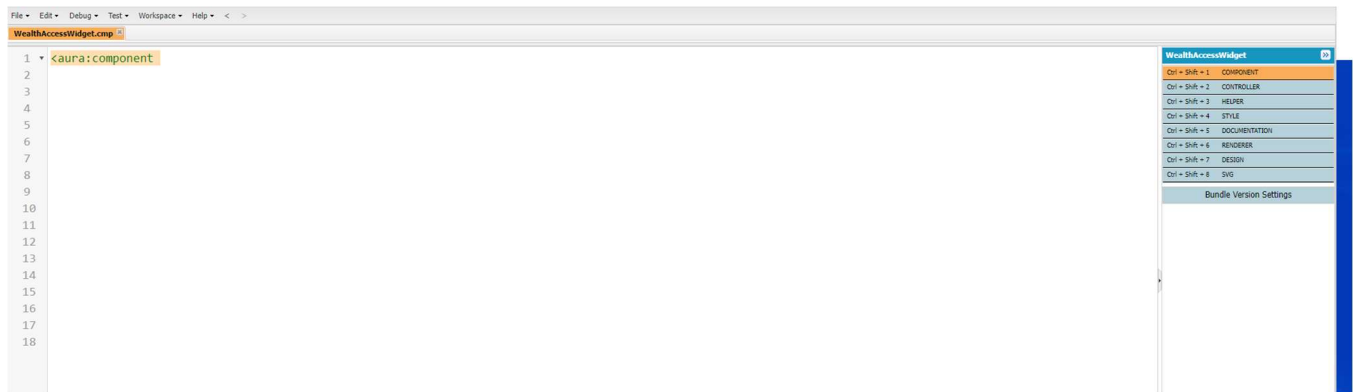
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2)



The "New Lightning Bundle" dialog box is shown. It has a "Name" field containing "WealthAccessAdvisorWidget" and an empty "Description" field. Below these is a "Component Configuration" section with the text "Create bundle with any of the following configurations (optional)". It contains five checkboxes: "Lightning Tab", "Lightning Page", "Lightning Record Page", "Experience Builder Site Page", and "Lightning Quick Action". A "Submit" button is at the bottom right.

3)



Create a New Lightning Application

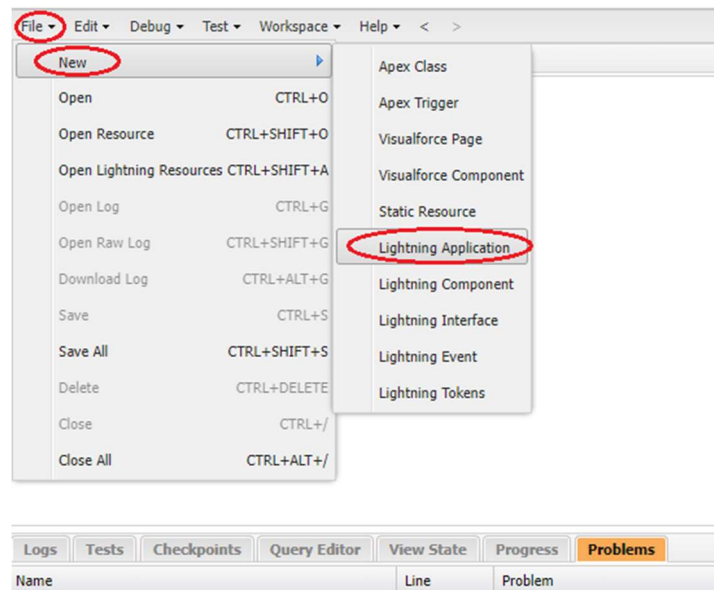
Remaining within the Developer Console, create a new Lightning Application by opening the File menu, selecting New and then Lightning Application. To utilize the code directly as provided in the appended code manual, please

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name the new Lightning Application - WealthAccessWidgetApp. No application configuration options are required for creation of this component.

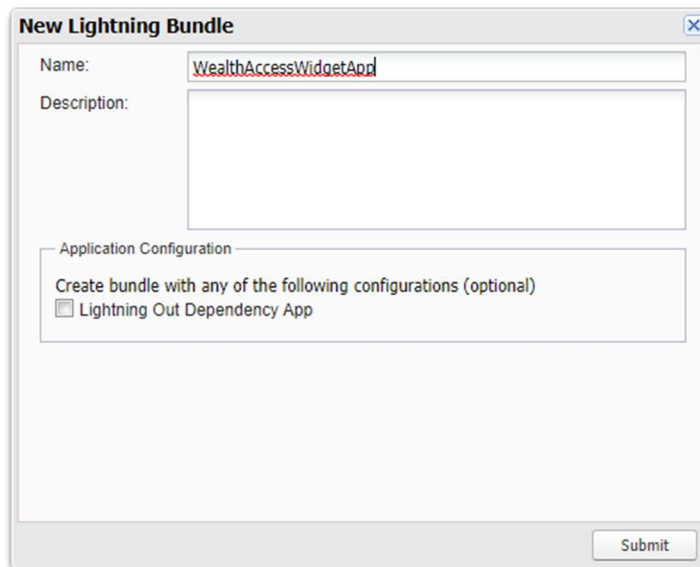
1)



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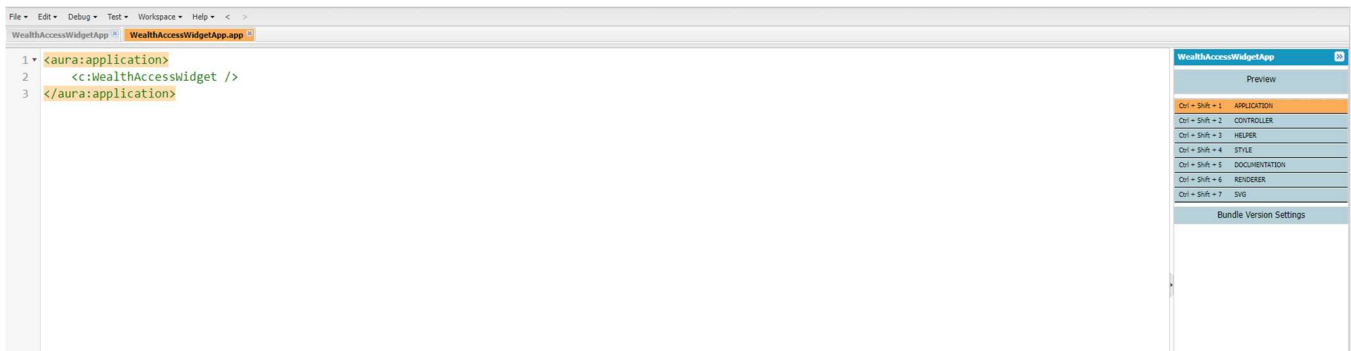
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2)



The "New Lightning Bundle" dialog box is shown. It has a title bar with a close button. The "Name:" field contains "WealthAccessWidgetApp". The "Description:" field is empty. Below these fields is a section titled "Application Configuration" with the text "Create bundle with any of the following configurations (optional)". There is a checkbox labeled "Lightning Out Dependency App" which is currently unchecked. A "Submit" button is at the bottom right.

3)



The screenshot shows the Salesforce IDE. The left pane displays the code for the "WealthAccessWidgetApp" component:

```
1 <aura:application>
2   <c:WealthAccessWidget />
3 </aura:application>
```

The right pane shows the "WealthAccessWidgetApp" component's preview and settings. The "Preview" tab is active, showing a table of component settings:

Preview
Ctrl + Shift + 1 APPLICATION
Ctrl + Shift + 2 CONTROLLER
Ctrl + Shift + 3 HELPER
Ctrl + Shift + 4 STYLE
Ctrl + Shift + 5 DOCUMENTATION
Ctrl + Shift + 6 RENDERER
Ctrl + Shift + 7 SVG

Below the table is a section for "Bundle Version Settings".

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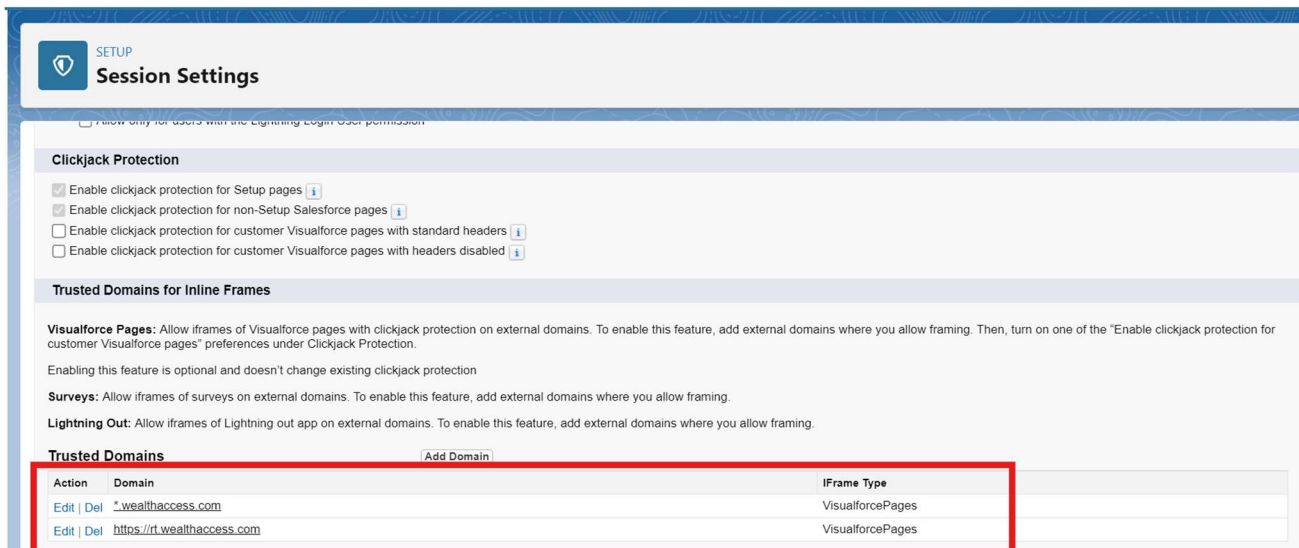
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Configuration Settings Required for Integration

Set Wealth Access URLs as Trust Domains

To allow for the display of Wealth Access widgets on Visualforce Pages, you will need to add Wealth Access specific URLs as Trusted Domains for Inline frames. You can do this under Setup – Session Settings – Trust Domains for Inline Frames. Click “Add Domain” and add the following URLs:

*.wealthaccess.com
<https://rt.wealthaccess.com>



The screenshot shows the Salesforce Setup interface for Session Settings. The 'Clickjack Protection' section has four checkboxes: 'Enable clickjack protection for Setup pages' (checked), 'Enable clickjack protection for non-Setup Salesforce pages' (checked), 'Enable clickjack protection for customer Visualforce pages with standard headers' (unchecked), and 'Enable clickjack protection for customer Visualforce pages with headers disabled' (unchecked). The 'Trusted Domains for Inline Frames' section includes instructions for Visualforce Pages, Surveys, and Lightning Out. Below these instructions is a table of trusted domains with two entries: '*.wealthaccess.com' and 'https://rt.wealthaccess.com', both with 'VisualforcePages' as the IFrame Type. The table has columns for Action, Domain, and IFrame Type.

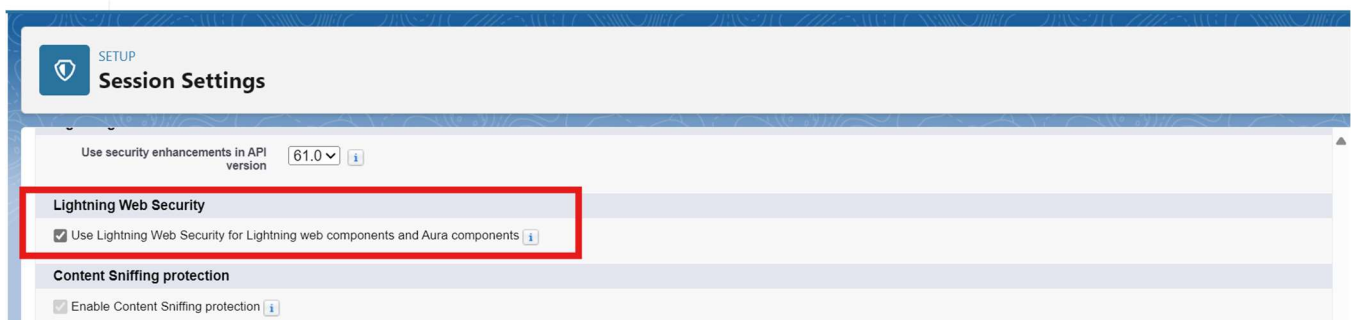
Action	Domain	IFrame Type
Edit Del	*.wealthaccess.com	VisualforcePages
Edit Del	https://rt.wealthaccess.com	VisualforcePages

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Enable Lightning Web Security

Enable “Use Lightning Web Security for Lightning web components and Aura components” found under Setup – Session Settings – Lightning Web Security.



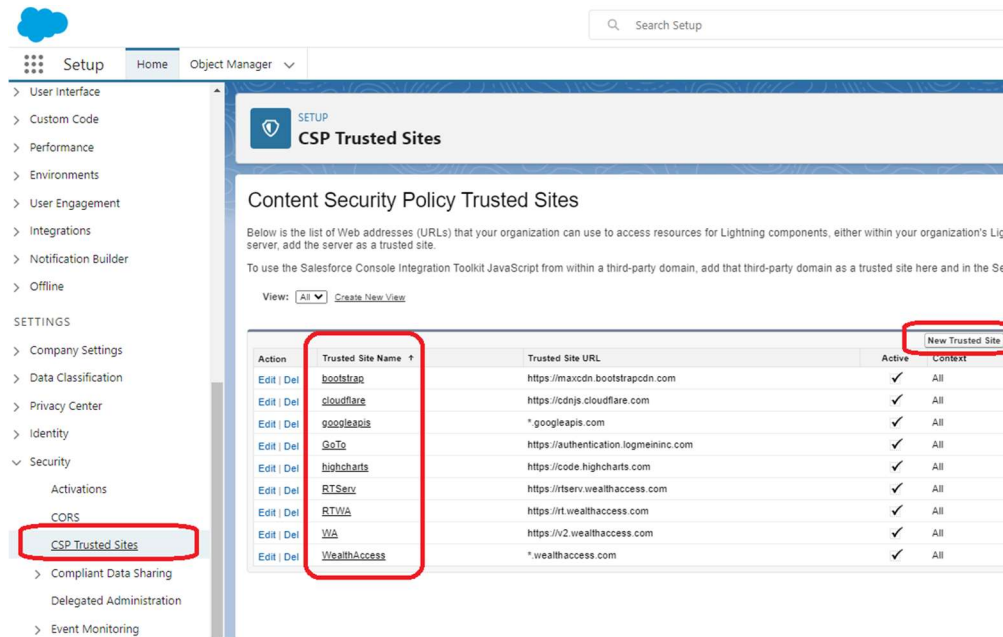
Set Wealth Access URLs as Trusted Sites

To avoid CSP errors with this integration, you will need to add the following urls as CSP Trusted Sites in Salesforce. You may do this under Setup – Security (Under the Settings Category) – CSP Trusted Sites, and then click the “New Trusted Site” button to add each url.

<https://maxcdn.bootstrapcdn.com>
<https://cdnjs.cloudflare.com>
*.googleapis.com
<https://authentication.logmeininc.com>
<https://code.highcharts.com>
<https://fonts.gstatic.com>
<https://code.highcharts.com>
<https://www.moneyguidepro.com>
<https://rtserv.wealthaccess.com>
<https://rt.wealthaccess.com>
<https://v2.wealthaccess.com>
*.wealthaccess.com

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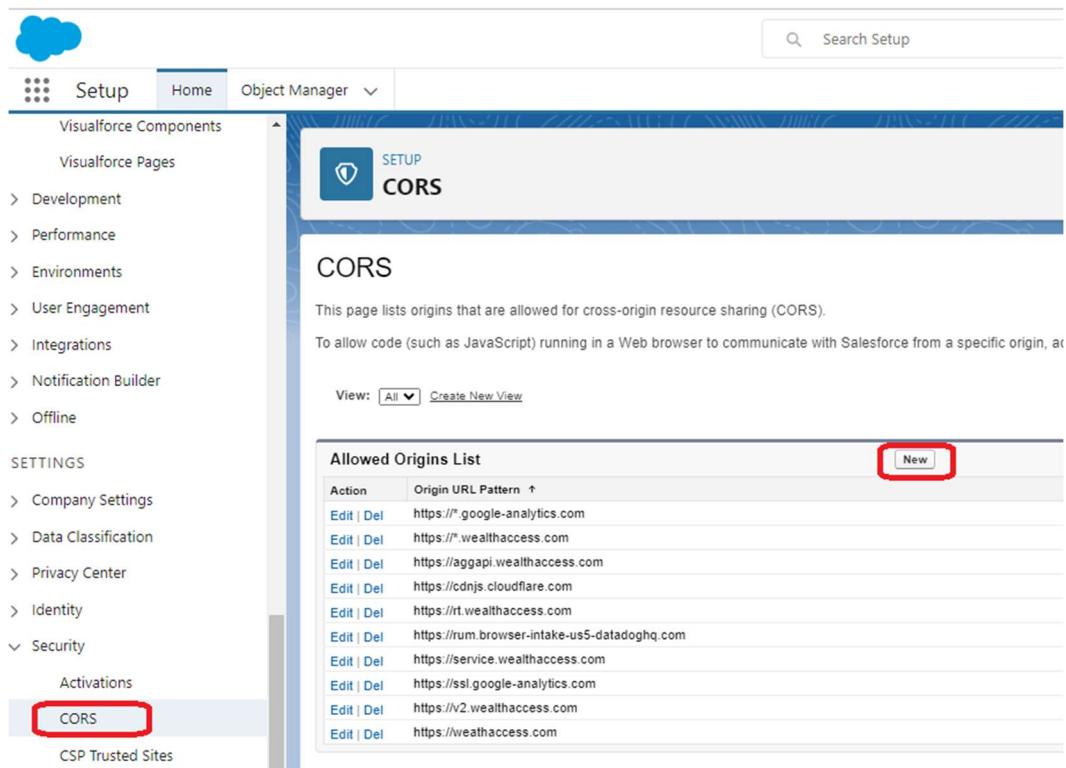
Set Wealth Access URLs To Allow for Cross-Origin Resource Sharing (CORS)

To allow the JavaScript code contained within the Wealth Access integration to communicate with Salesforce from the Wealth Access system, you will need to add the Wealth Access origins. You may do this under Setup – Security – CORS, and then click the “New” button to add each origin source.

https://*.google-analytics.com
<https://aggapi.wealthaccess.com>
<https://cdnjs.cloudflare.com>
<https://service.wealthaccess.com>
<https://v2.wealthaccess.com>
<https://weathaccess.com>
https://*.weathaccess.com
<https://rt.wealthaccess.com>

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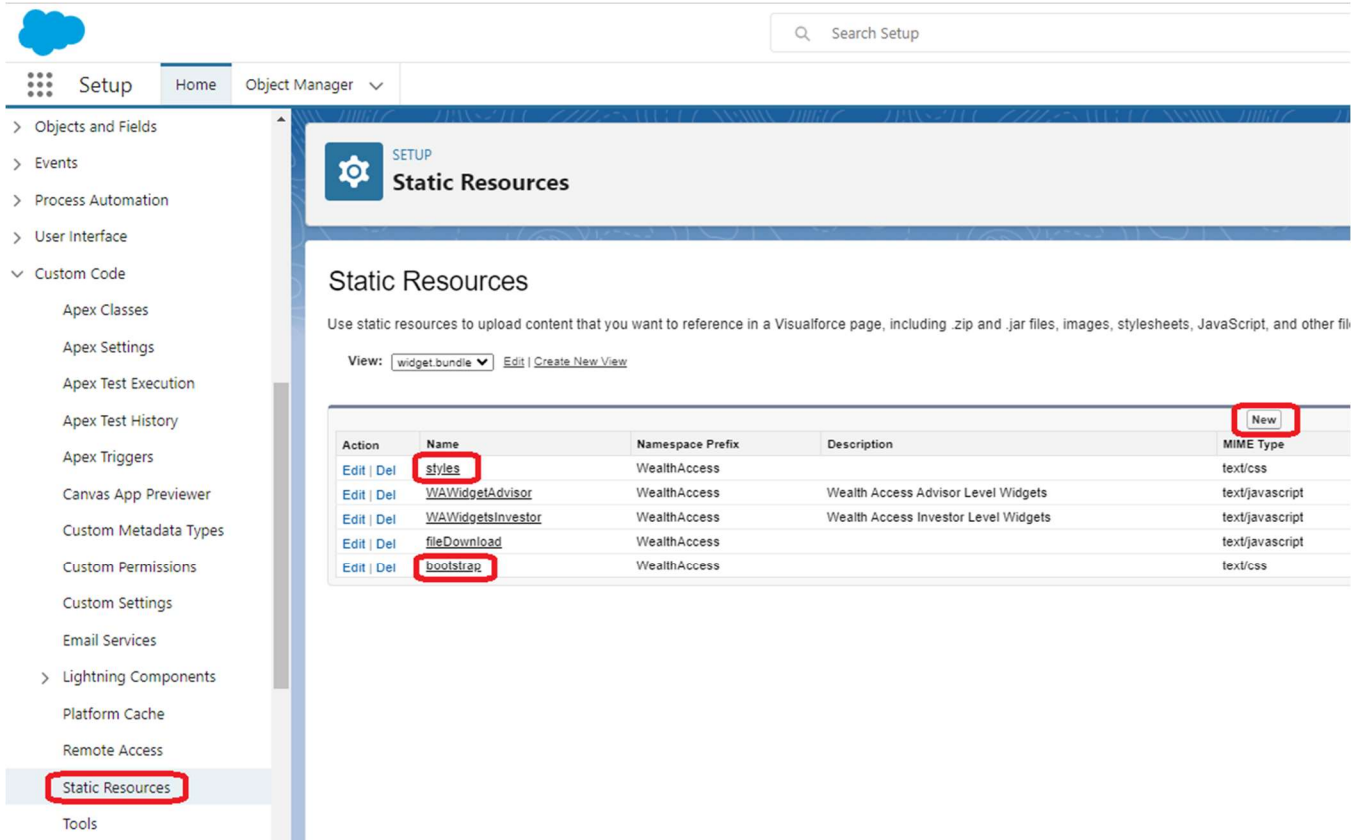


Setup WA Style Sheets as Static Resources

To apply the correct styling to the Wealth Access widgets within Salesforce, you will need to save the Wealth Access bootstrap style sheet as well as a secondary styles sheet as static resources within your Salesforce application. You may do this under Setup – Custom Code (Under the Platform Tools Category) – Static Resources, and then click the “New” button to add the style sheets. When creating this new static resource you will be required to attach a file. Please use the corresponding style sheets provided by Wealth Access for these resources.

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Static Resources

Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript, and other files.

View: widget bundle [Edit](#) [Create New View](#)

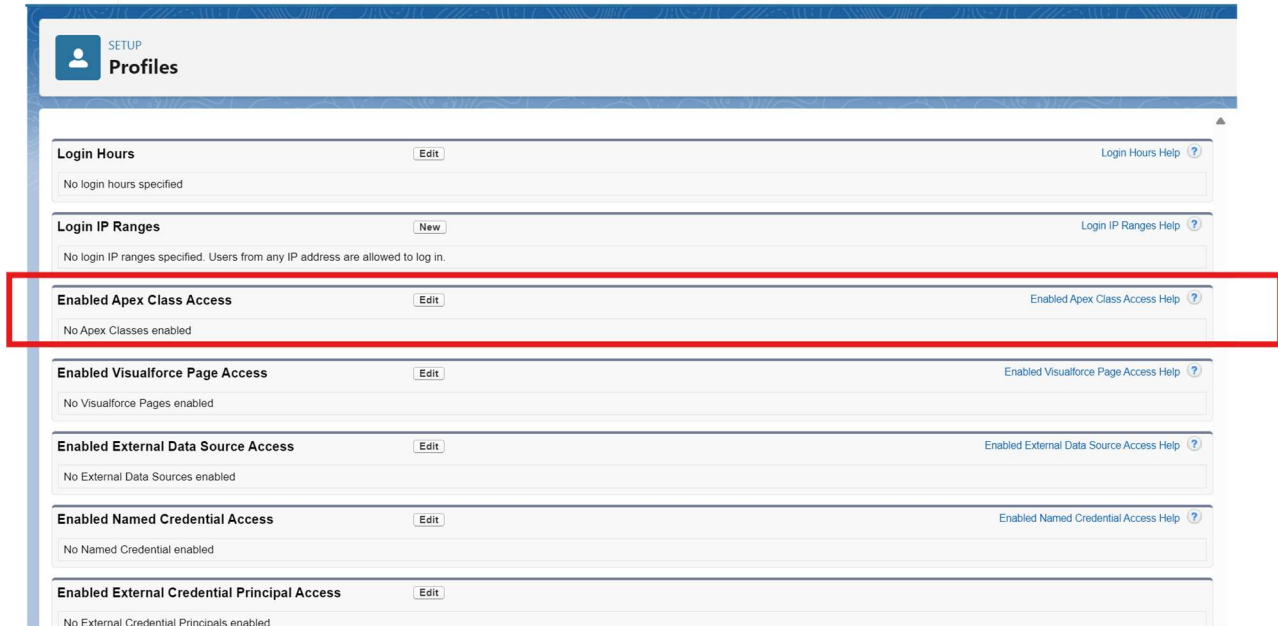
Action	Name	Namespace Prefix	Description	MIME Type
Edit Del	<u>styles</u>	WealthAccess		text/css
Edit Del	<u>WAWidgetAdvisor</u>	WealthAccess	Wealth Access Advisor Level Widgets	text/javascript
Edit Del	<u>WAWidgetsInvestor</u>	WealthAccess	Wealth Access Investor Level Widgets	text/javascript
Edit Del	<u>fileDownload</u>	WealthAccess		text/javascript
Edit Del	<u>bootstrap</u>	WealthAccess		text/css

Permission Access to Wealth Access Apex Class

Once the Wealth Access Apex Class has been built, you will need to grant access to the new Wealth Access Apex class to users. You can do this through the Setup – Users – Profiles feature. Select the profile type you would like to grant access, and then find the Enabled Apex Class Access section. Select the “Edit” button in the Enabled Apex Class Access section to add the Wealth Access Apex Class to that user profile.

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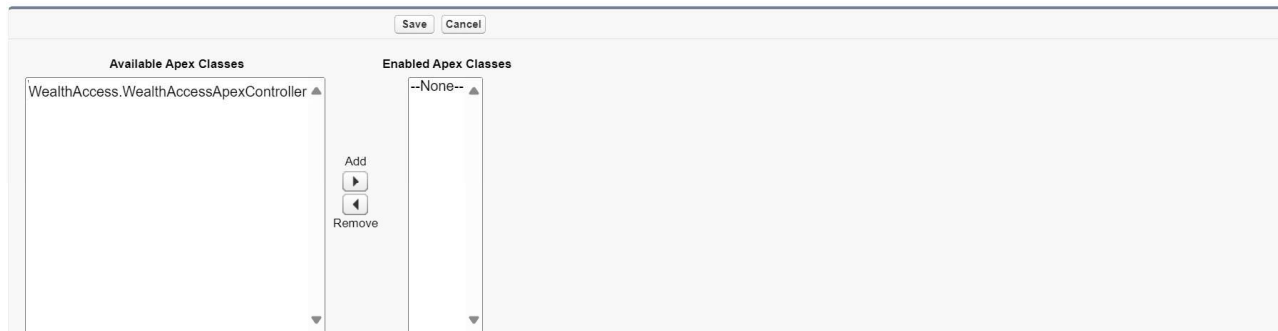
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The screenshot shows the Salesforce Setup interface for Profiles. The 'Enabled Apex Class Access' section is highlighted with a red box. It shows a status of 'No Apex Classes enabled' with an 'Edit' button and a help link.

Section	Action	Help
Login Hours	Edit	Login Hours Help
Login IP Ranges	New	Login IP Ranges Help
Enabled Apex Class Access	Edit	Enabled Apex Class Access Help
Enabled Visualforce Page Access	Edit	Enabled Visualforce Page Access Help
Enabled External Data Source Access	Edit	Enabled External Data Source Access Help
Enabled Named Credential Access	Edit	Enabled Named Credential Access Help
Enabled External Credential Principal Access	Edit	

Enable Apex Class Access

[Help for this Page](#)

The screenshot shows the 'Enable Apex Class Access' configuration window. It has 'Save' and 'Cancel' buttons at the top. Below are two lists: 'Available Apex Classes' and 'Enabled Apex Classes'. The 'Available Apex Classes' list contains 'WealthAccess.WealthAccessApexController'. The 'Enabled Apex Classes' list is currently empty, showing '--None--'. Between the lists are 'Add' and 'Remove' buttons.

Available Apex Classes	Enabled Apex Classes
WealthAccess.WealthAccessApexController	--None--

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Incorporating Newly Created Wealth Access Lightning Components on Desired Page in Your Institution's Salesforce Application

Now that you have created all of the necessary Lightning resources for the integration of Wealth Access Advisor and Investor-level widget's in Salesforce, it is time to incorporate the Wealth Access Advisor-level and Wealth Access Investor-level Lightning Components in the desired location in your firm's Salesforce application. To do this, you will need to login into your Salesforce application and select the desired page on which you would like to incorporate the widgets.

(Many of our clients have chosen to place the investor-level widgets within a tabulated experience on the page where client records/accounts are displayed. In addition, many of our clients have chosen to place the Advisor-level widgets on the advisor's Salesforce dashboard.)

Once the targeted page has been selected, select Edit Page from the Setup menu in the upper right corner of your Salesforce application (Gear Icon). You will find your two new Wealth Access Lightning Components listed under the Custom section of the Components list. You can then simply drag and drop the desired Advisor-level or Investor-level Component directly onto the page in the desired location.

Now that you have placed the desired Wealth Access Lightning Component where you would like in the current page, you will need to select the new component on the Edit Page screen and apply the desired widget code to that component. A full list of available Advisor-level and Investor-level widgets can be found in our [Wealth Access Widget API Library](#). The widget code to input in the Widget Code assignment field under the Edit Page display for the Wealth Access Lightning components will be displayed under the Possible Widgets list under the All Investor Widgets or All Advisor Widgets sections of the Wealth Access Widget API Library.

Finally, save your page updates and then click Activate and assign the page as an Org Default. Hit next and save. Return to your Salesforce application to see new Wealth Access Lightning Components displayed.