Wealth Access Widget Integration for Salesforce
Setup Guide and Code Manual

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

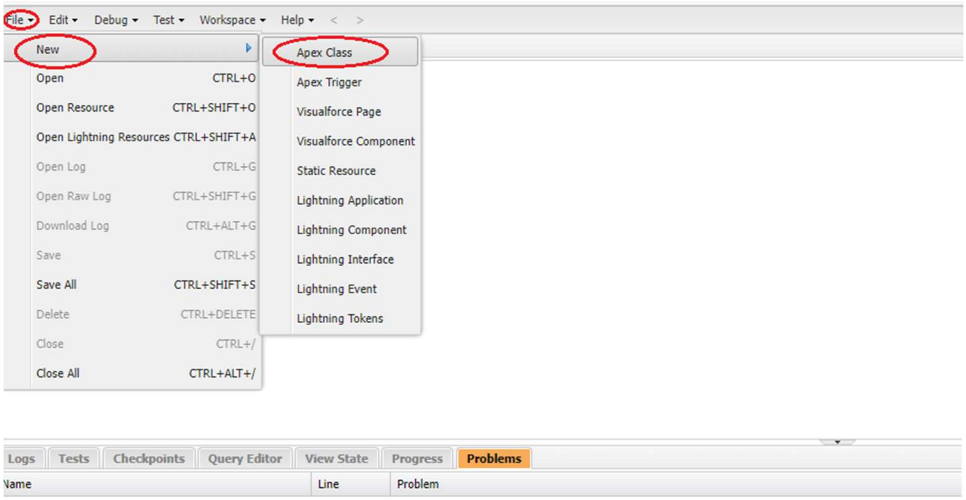
Each of the Lightning resources listed below will be created within the Developer Console of your Salesforce application. We encourage the use of a partial copy or full production Salesforce sandbox for creating the various Lightning resources, coding, and testing.

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

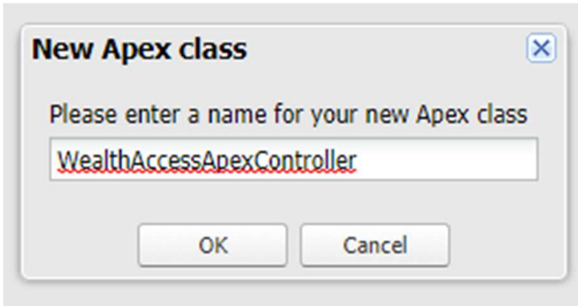
Create a New Apex Class

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)



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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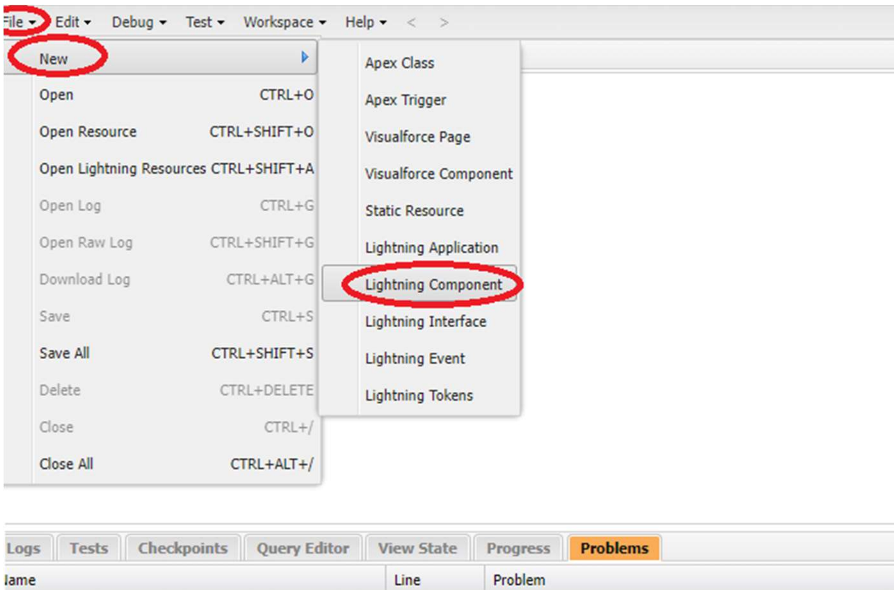
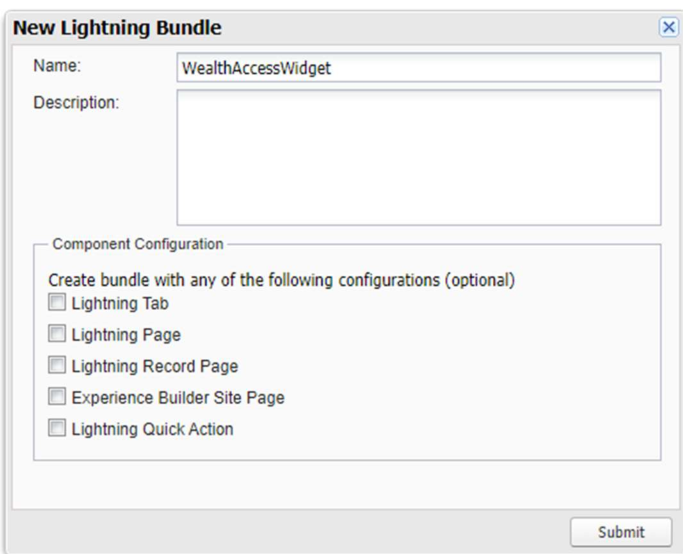
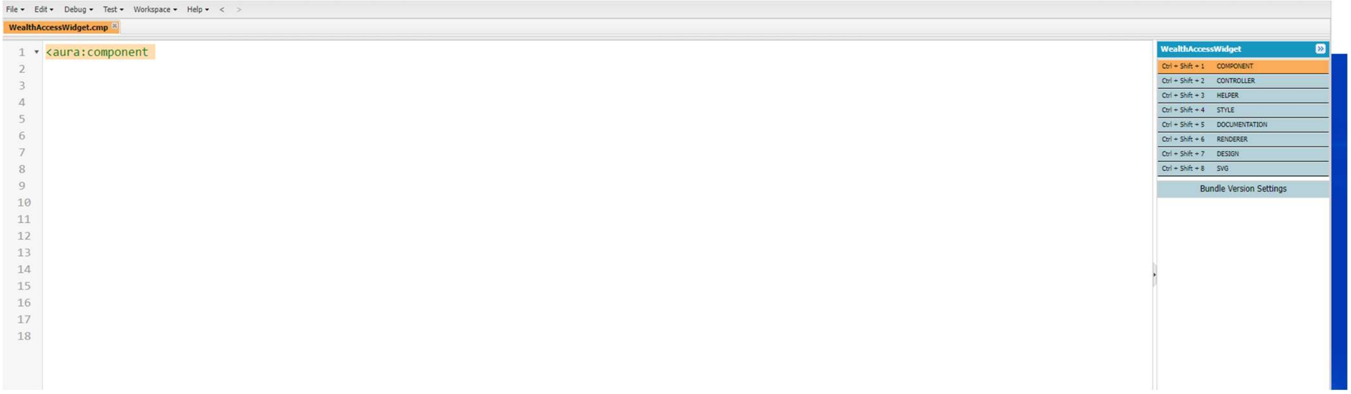
1)



2)



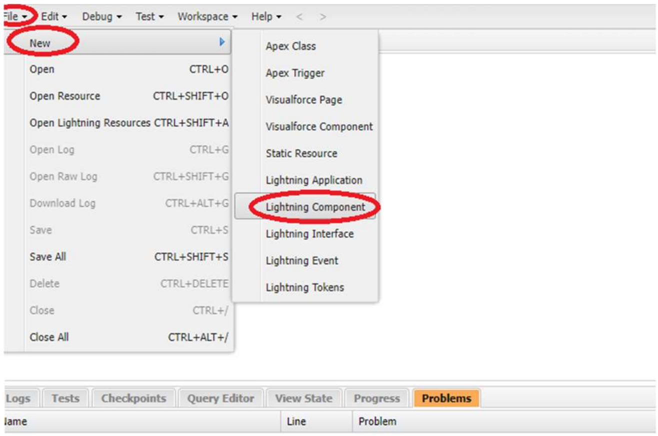
3)



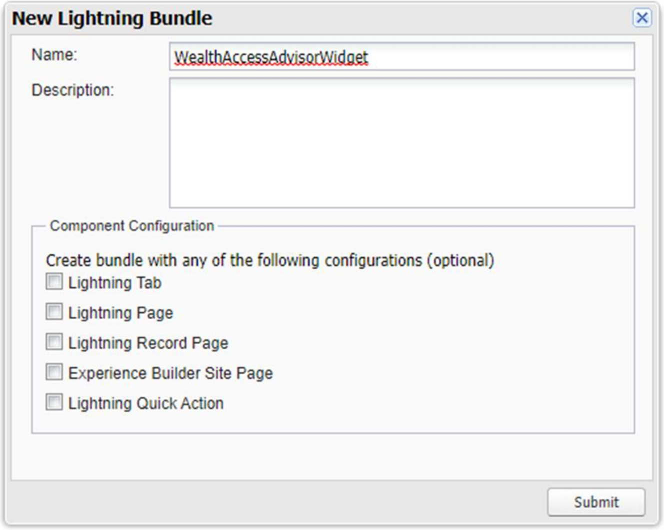
Create a New Lightning Component for Advisor-Level Wealth Access Widgets

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.

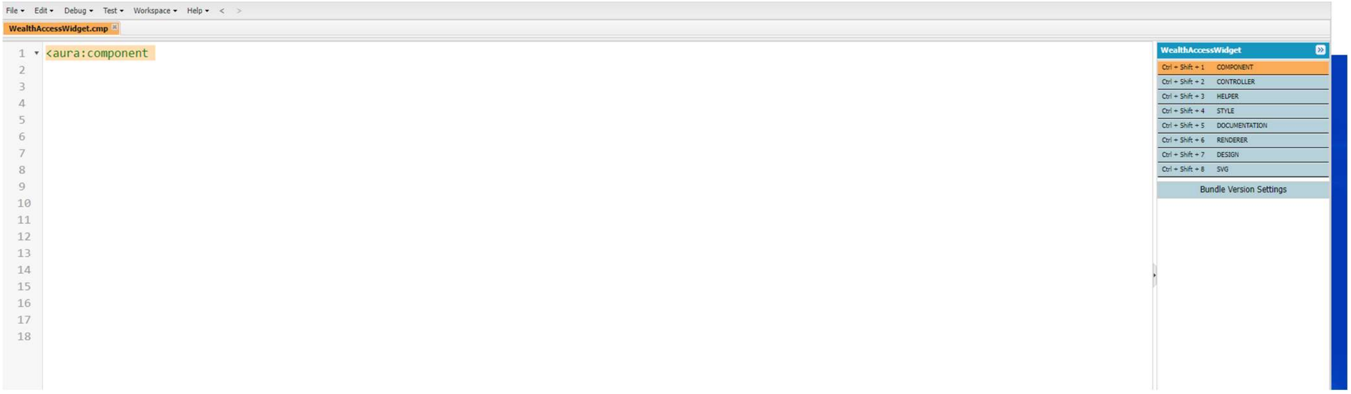
1)



2)



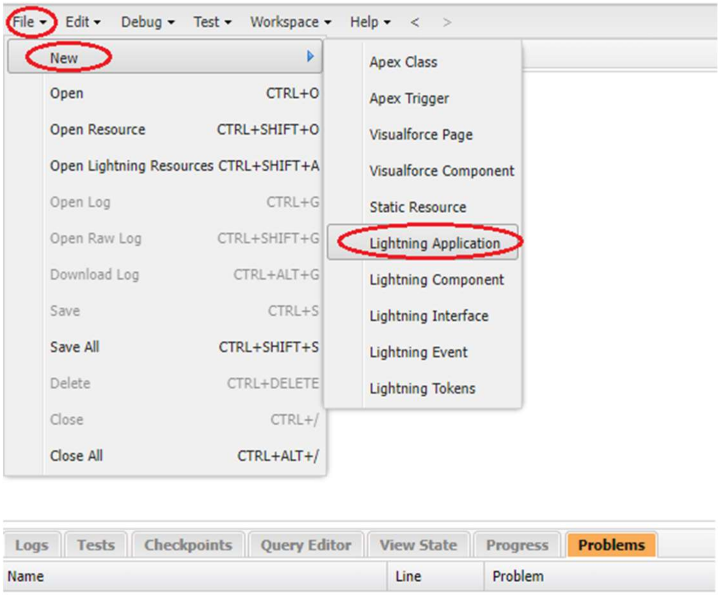
3)



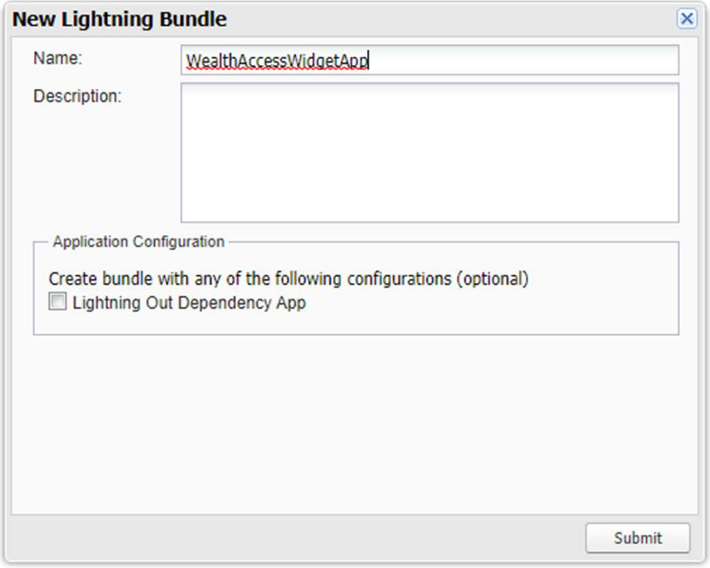
Create a New Lightning Application

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

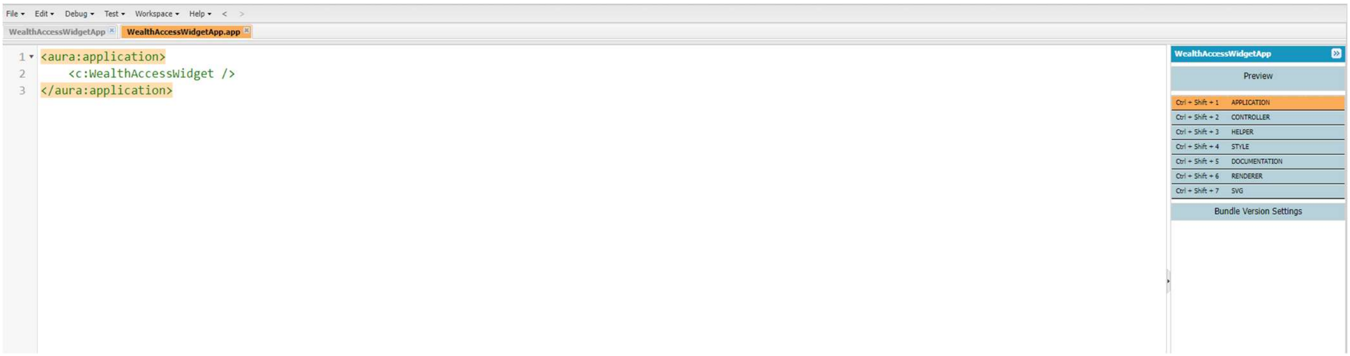
1)



2)


New Lightning Bundle
Name:
WealthAccessWidgetApp
Description:
Application Configuration
Create bundle with any of the following configurations (optional)
Lightning Out Dependency App
Submit

3)

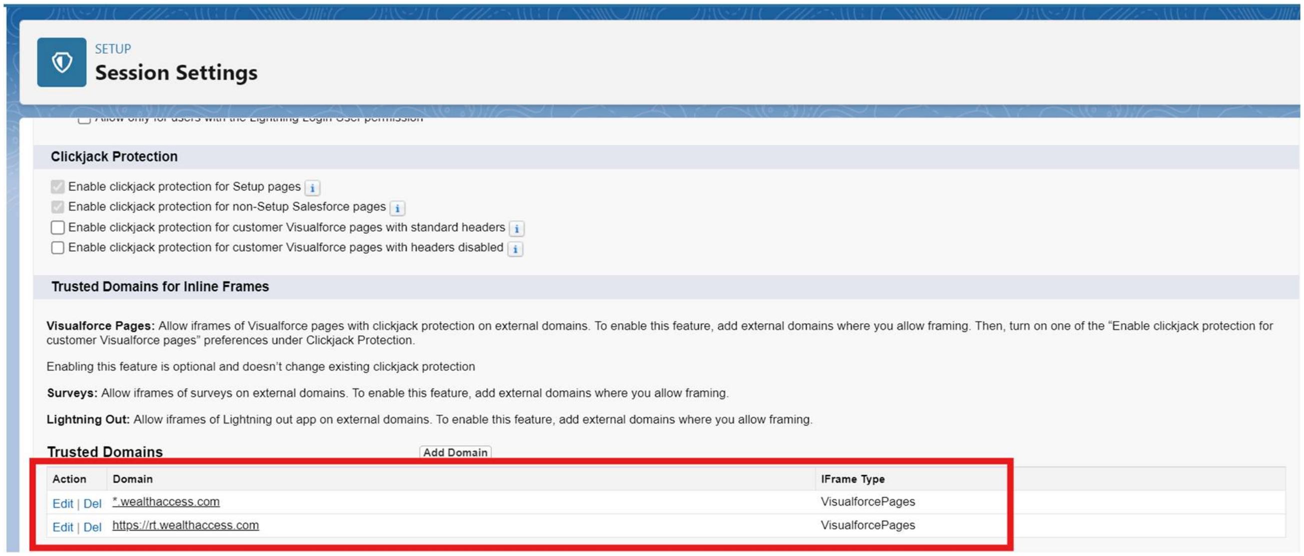

File Edit Debug Test Workspace Help
WealthAccessWidgetApp
WealthAccessWidgetApp.app
<aura:application>
<c:WealthAccessWidget />
</aura:application>
WealthAccessWidgetApp
Preview
Ctrl + Shift + 1 APPLICATION
Ctrl + Shift + 2 CONTROLLER
Ctrl + Shift + 3 HELPER
Ctrl + Shift + 4 STYLE
Ctrl + Shift + 5 DOCUMENTATION
Ctrl + Shift + 6 RENDERER
Ctrl + Shift + 7 SVG
Bundle Version Settings

Configuration Settings Required for Integration

Set Wealth Access URLs as Trust Domains

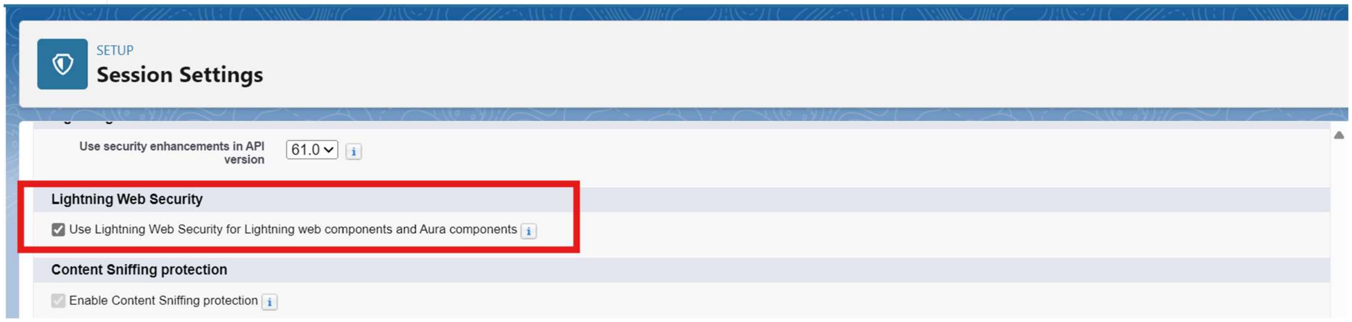
To allow for the display of Wealth Access widgets on Visualforce Pages, you will need to add Wealth Access specific URLs as Trusted Domains for Inline frames. You can do this under Setup – Session Settings – Trust Domains for Inline Frames. Click "Add Domain" and add the following URLs:

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



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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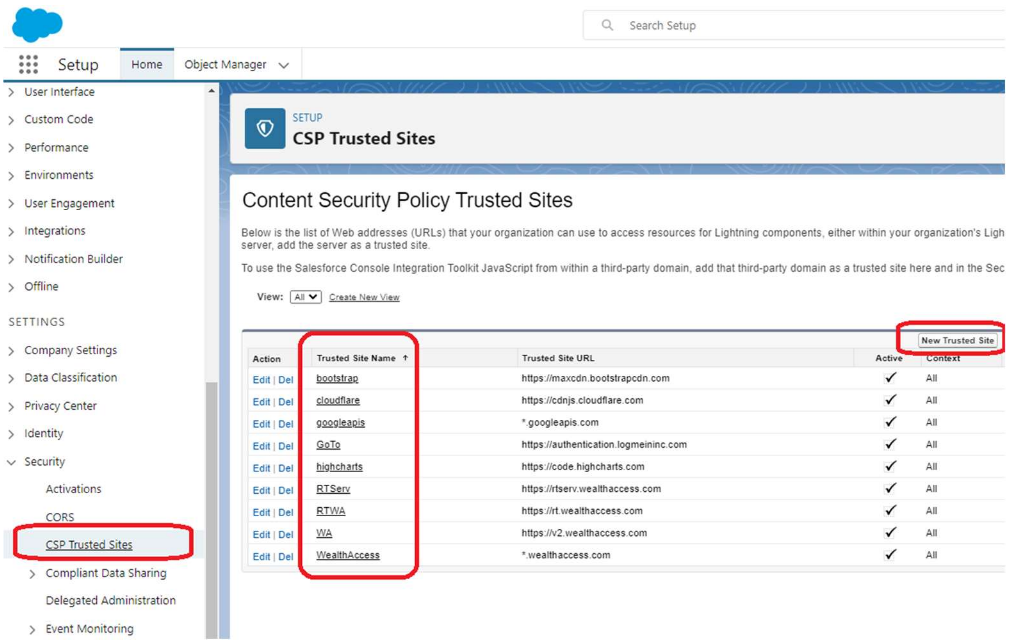
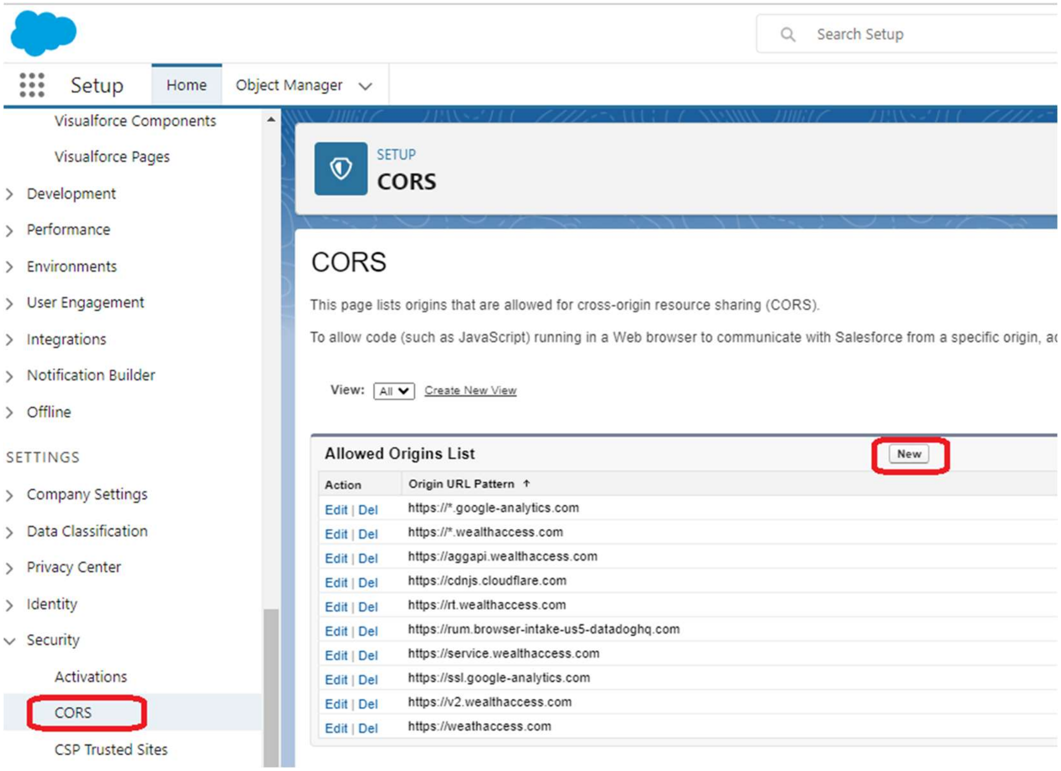


Set Wealth Access URLS To Allow for Cross-Origin Resource Sharing (CORS)

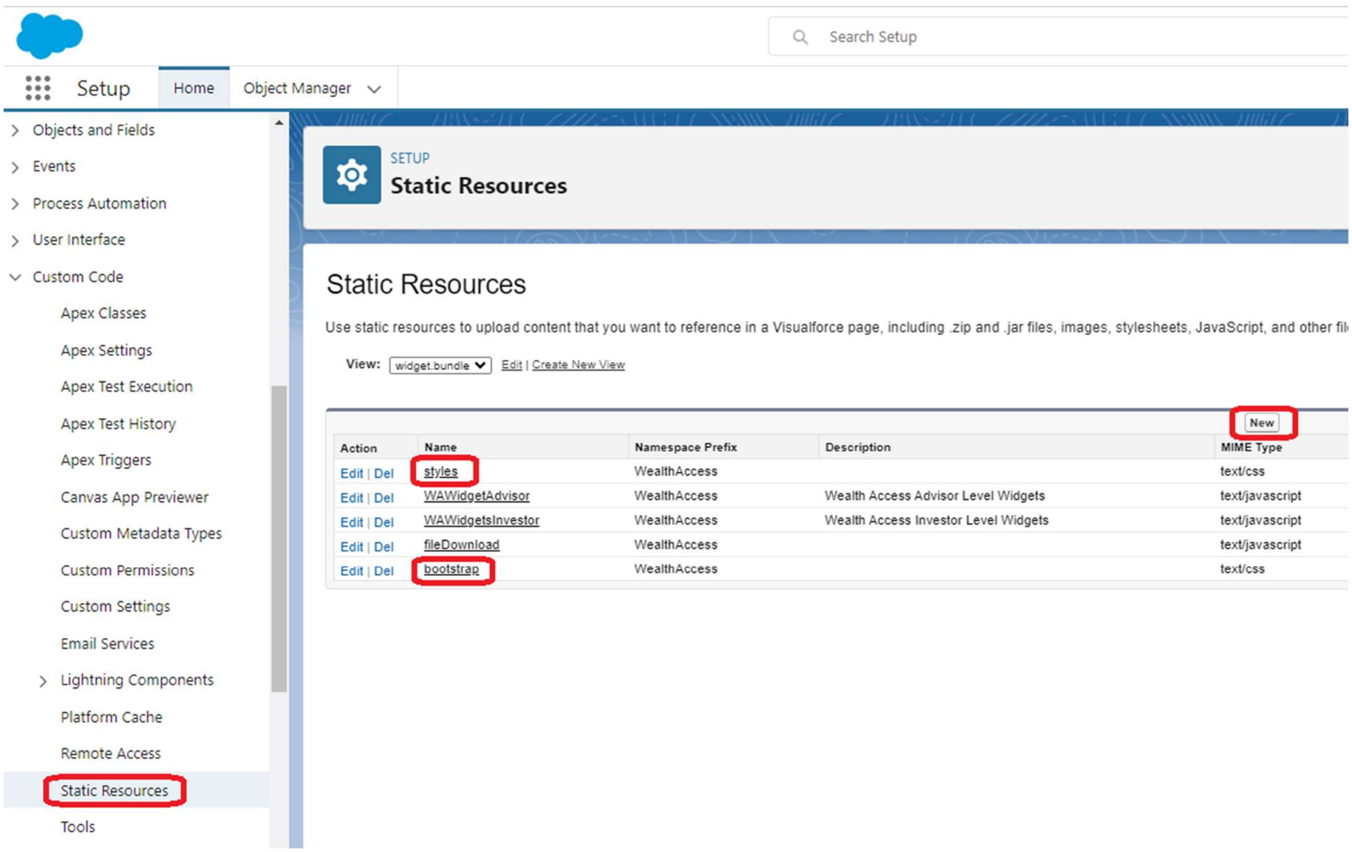
To allow the JavaScript code contained within the Wealth Access integration to communicate with Salesforce from the Wealth Access system, you will need to add the Wealth Access origins . You may do this under Setup – Security – CORS, and then click the "New" button to add each origin source.

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



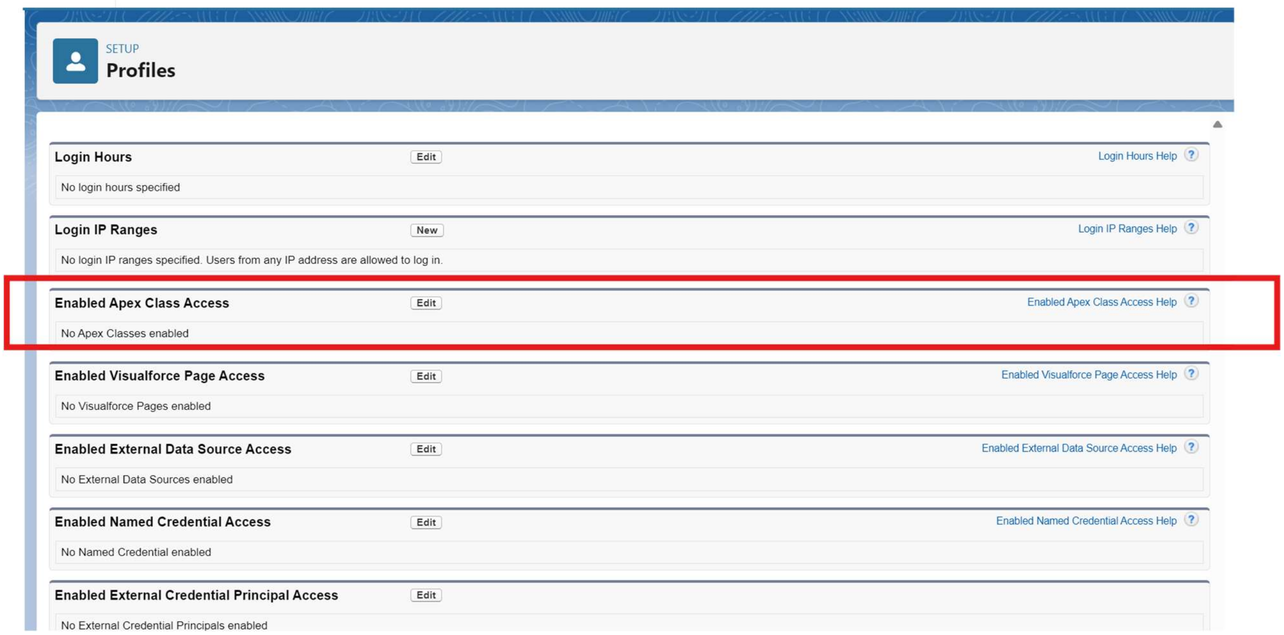
Setup WA Style Sheets as Static Resources

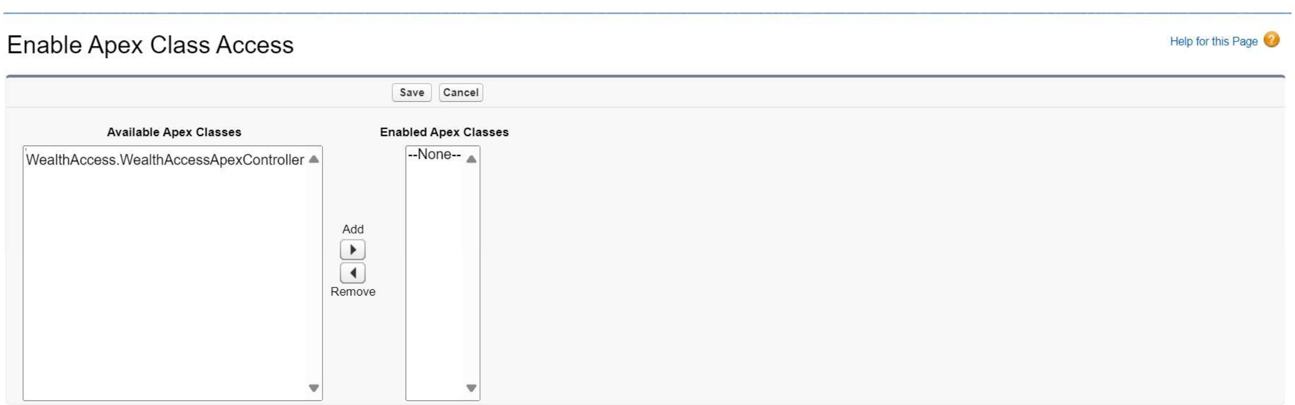
To apply the correct styling to the Wealth Access widgets within Salesforce, you will need to save the Wealth Access bootstrap style sheet as well as a secondary styles sheet as static resources within your Salesforce application. You may do this under Setup – Custom Code (Under the Platform Tools Category)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



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.


SETUP
Profiles
Login Hours
Edit
Login Hours Help
No login hours specified
Login IP Ranges
New
Login IP Ranges Help
No login IP ranges specified. Users from any IP address are allowed to log in.
Enabled Apex Class Access
Edit
Enabled Apex Class Access Help
No Apex Classes enabled
Enabled Visualforce Page Access
Edit
Enabled Visualforce Page Access Help
No Visualforce Pages enabled
Enabled External Data Source Access
Edit
Enabled External Data Source Access Help
No External Data Sources enabled
Enabled Named Credential Access
Edit
Enabled Named Credential Access Help
No Named Credential enabled
Enabled External Credential Principal Access
Edit
No External Credential Principals enabled


Enable Apex Class Access
Help for this Page
Save
Cancel
Available Apex Classes
WealthAccess.WealthAccessApexController
Add
Remove
Enabled Apex Classes
--None--

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.