

Salesforce Financial Services Cloud (FSC) Training

COURSE CONTENT

GET IN TOUCH



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About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

The Salesforce Financial Services Cloud (FSC) training offered by Multisoft Systems is a specialized program designed to provide a comprehensive understanding of the Salesforce Financial Services Cloud platform. Aimed primarily at professionals in the financial sector, the course focuses on teaching how to leverage Salesforce FSC to enhance customer relations and streamline financial services operations.

Topics

- ✓ Introduction to Salesforce Industry Verticals
- ✓ Introduction to Salesforce Financial Services Cloud (FSC)
- ✓ Getting Started with FSC
- ✓ Accounts & Contacts in FSC
- ✓ Relationships in FSC
- ✓ Life Events & Business Milestones
- ✓ Roll-Ups
- ✓ Action Plans
- ✓ Document Tracking & Approvals
- ✓ Leads, Referrals & Opportunities
- ✓ Compliant Data sharing
- ✓ FSC On Mobile
- ✓ Latest Release Features (Currently Spring '21)
- ✓ Commercial Banking Related Features
- ✓ Insurance Related Features
- ✓ Mortgage Related Features
- ✓ Retail Banking Related Features
- ✓ Wealth Management Related Features
- ✓ Reports & Dashboards