

Salesforce Administer Financial Services Cloud Solutions - IND330 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 Administer Financial Services Cloud Solutions – IND330 training by Multisoft Systems is designed to equip professionals with in-depth knowledge of administering Financial Services Cloud (FSC) environments effectively. This comprehensive program focuses on configuring and managing industry-specific data models, including households, financial accounts, relationships, and interaction summaries tailored for banking, wealth management, and insurance organizations.

Module 1: Introduction to Financial Services Cloud

- ✓ Define Financial Services Cloud
- ✓ Explore FSC Architecture
- ✓ Examine FSC Data Models
- ✓ Review and Assign FSC Permission Sets

Module 2: Objects and Applications

- ✓ Identify Differences Between Standard and Custom FSC Objects
- ✓ Configure the Financial Account Object
- ✓ Configure the Person Life Event Object
- ✓ Discover OOTB FSC Applications
- ✓ Explore Custom Applications

Module 3: Need-Based Referral Management

- ✓ Discover the Lead and Referral Object
- ✓ Explore Referral Management and Conversion
- ✓ Implement Referral Tracking and Scoring

Module 4: Customer Groups and Relationships

- ✓ Define FSC Customer Groups and Relationships
- ✓ Manage Household Relationships
- ✓ Create Custom Group Record Types

Module 5: Data Management Tools

- ✓ Examine FSC Record Rollups
- ✓ Review Rollup by Lookup Rules
- ✓ Define Data Processing Engine
- ✓ Explore Additional Data Management Tools

Module 6: Actionable Relationship Center 2.0

- ✓ Define Actionable Relationship Center 2.0
- ✓ Explore ARC 2.0 Features
- ✓ Create Custom ARC Relationship Graphs

Module 7: Automation Tools

- ✓ Define FSC Automation Tools
- ✓ Explore Automation Components
- ✓ Manage Automation Component Permissions
- ✓ Deploy Individual Automation Components

Module 8: Business Process and Compliance Tools

- ✓ Define Action Plans
- ✓ Examine Action Plan Templates
- ✓ Define Interaction Summaries
- ✓ Capture and Share Interaction Summaries
- ✓ Define Compliant Data Sharing
- ✓ Explore Additional Compliance Tools