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Administer Agentforce Financial Services (IND330)

OEM: Salesforce • Code: IND330

COURSE DESCRIPTION

Discover how to unify customer data and build client trust with Agentforce Financial Services (AFS). In this 4-day instructor-led course, learn how to configure personalized AFS solutions for Retail Banking and Wealth Management. Implement need-based referral management, visualize customer relationships using Actionable Relationship Center (ARC) 2.0, and deploy automation components, among other AFS features and tools, in order to deliver engaging, data-driven financial service experiences that boost client satisfaction ratings, fuel advisor productivity, and increase profitability.

AUDIENCE PROFILE

- This course is designed for experienced administrators who are responsible for configuring and maintaining Agentforce Financial Services solutions within Retail Banking or Wealth Management.

PREREQUISITES

- Students should hold the Salesforce Certified Platform Administrator certification or have at least six months of experience in an administrator role, ideally within the financial sector, although this is not required.
- Complete the required Trailhead prework — "Administer Agentforce Financial Services (IND330) Prework" — before the session starts.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- Explain core capabilities and benefits of using Financial Services Cloud.
- Navigate key FSC features and functionality.
- Administer Financial Services Cloud solutions for Retail Banking and Wealth Management.
- Explain core capabilities and benefits of using Agentforce Financial Services.
- Navigate key AFS features and functionality.
- Administer Agentforce Financial Services solutions for Retail Banking and Wealth Management.
- Explain AFS architecture and data models, including the Customer Groups and Relationships Data Model and Managed Package Data Model.
- Identify key differences between standard and custom AFS objects.
- Configure out-of-the-box (OOTB) AFS objects, including financial accounts, person life events, assets and liabilities, and billing statements, in addition to out-of-the-box applications, such as the retail banking console.
- Manage AFS customer groups and relationships, including household relationships and custom group record types.

- Implement need-based referral management using the lead and referral object.
- Use various data management tools, including record rollups, Rollup by Lookup rules, and Data Processing Engine.
- Visualize customer relationships using Actionable Relationship Center 2.0.
- Build and deploy AFS automation components.
- Summarize key capabilities of action plans, interaction summaries, and compliant data sharing.

COURSE OUTLINE

Module 1: Introduction to Agentforce Financial Services

- Define Agentforce Financial Services
- Explore AFS Architecture
- Examine AFS Data Models
- Review and Assign AFS Permission Sets

Module 2: Objects and Applications

- Identify Differences Between Standard and Custom AFS Objects
- Configure the Financial Account Object
- Configure the Person Life Event Object
- Discover OOTB AFS 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 AFS Customer Groups and Relationships
- Manage Household Relationships
- Create Custom Group Record Types

Module 5: Data Management Tools

- Examine AFS 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 AFS 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