

Financial-Services-Cloud Practice Materials Have High Quality and High Accuracy - RealValidExam



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Selecting the products of RealValidExam which provide the latest and the most accurate information about Salesforce Financial-Services-Cloud, your success is not far away.

Salesforce Financial Services Cloud (FSC) is a customer relationship management (CRM) platform designed specifically for financial advisors, insurance agents, and bankers. It helps these professionals manage their clients' financial information, track their interactions, and provide personalized advice. Salesforce FSC is a powerful tool that can help financial institutions improve their customer service, increase productivity, and grow their business.

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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q170-Q175):

NEW QUESTION # 170

Which three types of Account-Account relationships are displayed in the Actionable Relationship Center?

- **A. Accounts & Members**

- B. Accounts & Businesses
- C. Accounts & Groups
- D. Accounts & Peers

Answer: A,C,D

NEW QUESTION # 171

What feature allows a user to group campaigns within a specific marketing program or initiative?

- A. Campaign members
- B. Campaign lists
- C. Campaign Hierarchy
- D. Campaign influence

Answer: C

NEW QUESTION # 172

A consultant is looking to create a guided screen to be used by customer service agents answering the phone to authenticate the caller and positively identify them. The agent will ask the caller to provide their full name and the last four digits of their social security number, which is not stored in Salesforce. The agent will enter the provided information into a form, and upon clicking submit, a web service call is made to an external authentication service to authenticate the caller.

What should the consultant do to fulfill the needed requirements?

- A. Create a screen flow.
- B. Create an OmniScript flow.
- C. Create a Canvas application for the Authentication module.
- D. Create a Lightning web component.

Answer: A

Explanation:

A screen flow is a type of flow that guides users through a series of screens to complete a task or collect information². Screen flows can also interact with external systems using Apex actions or invocable actions³.

In this case, the consultant can create a screen flow that collects the caller's name and social security number from the agent, and then invokes an Apex action or an invocable action that makes a web service call to an external authentication service.

NEW QUESTION # 173

Which three permission sets grant access or extend permissions for record alerts in Financial Services Cloud (FSC)?

- A. FSC Foundations permission set
- B. FSC Standard permission set
- C. OmniStudio Admin permission set
- D. OmniStudio User permission set
- E. FSC Basic permission set

Answer: A,B,D

Explanation:

Record alerts are a feature of Financial Services Cloud that let users create and display alerts on record pages to highlight important information or actions. Record alerts are based on OmniStudio, a low-code platform for building digital experiences in Salesforce. To access or extend permissions for record alerts in Financial Services Cloud, users need to have one of the following permission sets: FSC Standard permission set: This permission set grants access to the core features of Financial Services Cloud, including record alerts. Users with this permission set can view and create record alerts on supported objects, such as accounts, contacts, financial accounts, and opportunities¹.

FSC Foundations permission set: This permission set grants access to the common features of Financial Services Cloud that are shared across subverticals, such as retail banking, wealth management, and insurance. Users with this permission set can view and create record alerts on supported objects².

OmniStudio User permission set: This permission set grants access to the OmniStudio features, such as OmniScripts, DataRaptors,

Integration Procedures, and Record Alerts. Users with this permission set can view and create record alerts on any object that has the Record Alert component enabled³.

References:

FSC Standard Permission Set

FSC Foundations Permission Set

OmniStudio User Permission Set

NEW QUESTION # 174

A client has called their Financial Advisor to open an Education Savings Account for their first child. What 2 steps should the Financial Advisor take in the Financial Services Cloud App to capture that information?

- A. Create two Life Events, one for the birth of the child and one for the Education Savings Account.
- **B. Create a Life Event for the birth of the child and a Financial Goal for the Education Savings Account**
- **C. Create a Life Event for the birth of the child and a Referral for the Education Savings Account**
- D. Create a case and include the target Savings amount for the Education Savings Account and relate the case to the child's Person Account.
- E. Create a Referral for the Banker for an Education Savings Account

Answer: B,C

Explanation:

The following steps should be taken by the Financial Advisor in Financial Services Cloud App to capture the information about opening an Education Savings Account for their client's first child:

Create a Life Event for the birth of the child and a Referral for the Education Savings Account. A Life Event is a construct in Financial Services Cloud that allows you to track significant events in your client's life that may affect their financial needs or goals. You can use Life Events to create a record for the birth of the child and link it to the client's account. A Referral is a construct in Financial Services Cloud that allows you to capture a customer need or interest and assign it to another advisor or line of business. You can use Referrals to create a record for the Education Savings Account and route it to the appropriate banker.

Create a Life Event for the birth of the child and a Financial Goal for the Education Savings Account. A Financial Goal is a construct in Financial Services Cloud that allows you to track your client's financial objectives and measure their progress towards achieving them. You can use Financial Goals to create a record for the Education Savings Account and associate it with the client's account and financial accounts. Verified References: : Salesforce Financial Services Cloud User Guide, page 29. : Salesforce Financial Services Cloud User Guide, page 30. : Salesforce Financial Services Cloud User Guide, page 33.

NEW QUESTION # 175

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