

Questions for the Salesforce Financial-Services-Cloud Exam - 100% Money-Back Guarantee

About Financial Services Cloud Exam

Get Started with Financial Services Cloud

Learning Objectives

After completing this unit, you'll be able to:

Explain the basics of Financial Services Cloud.

Discuss how Financial Services Cloud fits into the Salesforce Platform.

Describe the partner ecosystem.



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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q109-Q114):

NEW QUESTION # 109

In Financial Services Cloud, what is the criteria for commas and symbols to be displayed correctly on the Financial Account Summary component?

- A. Account currency must match org default currency.
- **B. User's locale must match user's currency.**
- C. User's locale and language must match user's currency.
- D. User currency must match org default currency.

Answer: B

Explanation:

Explanation

The criteria for commas and symbols to be displayed correctly on the Financial Account Summary component is that user's locale must match user's currency. The locale is a setting that determines how dates, times, numbers, and currencies are formatted and displayed for a user. The currency is a setting that determines how monetary amounts are formatted and displayed for a user. By matching the user's locale with their currency, FSC can ensure that commas and symbols are displayed correctly on the Financial Account Summary component according to the user's preferences and expectations

NEW QUESTION # 110

Which three standard fields are available to track a customer's retirement goal process?

- A. Target Value
- B. Target Date
- C. Actual Value
- D. Total Value
- E. Contributions

Answer: A,B,C

NEW QUESTION # 111

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- B. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.
- C. Use Process Builder to create a workflow to summarize data at the Person Account level.
- D. Create a custom object to track client's financial data

Answer: B

Explanation:

A Primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use Primary Group to roll up financial data from all the financial accounts that are related to the client or the group. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION # 112

A financial services company wants to use the Financial Services Cloud Person Account data model. The company needs two Person Account record types, one to represent Individual customer and one to represent Individual independent advisors that send referrals.

What should the administrator do to set up the new record types?

- A. Create a record type on the Contact object.
- B. Create custom fields on the Person Account object.
- C. Configure Individual Record Type Mapper" custom metadata.
- D. Enable "Use Person Account" custom setting.

Answer: C

Explanation:

Explanation

To set up the new record types for Person Accounts, the administrator should configure Individual Record Type Mapper custom metadata. The Individual Record Type Mapper is a custom metadata type in Financial Services Cloud that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. The Individual Record Type Mapper maps Person Account record types to Individual record types, so that when a new Individual record is created from an email or calendar event, it automatically creates a corresponding Person Account record with the same record type. To configure Individual Record

Type Mapper custom metadata, you need to go to Setup > Custom Metadata Types > Individual Record Type Mapper > Manage Records and create a new record for each Person Account record type and its matching Individual record type. Verified References: : Salesforce Help Article [8] : Salesforce Help Article [9]

NEW QUESTION # 113

Mortgage Broker Sue Berry wants to give an incentive reward to her top internal referrers. What is the best practice for Sue Berry to identify her top referrers quickly?

- A. Log each referral as an activity and create a dashboard.
- B. Use the Referral Performance by User dashboard to get the data.
- C. Use Action Plans to create Referral Records.
- D. Log referrers in Salesforce using the Lead object and create a "My top Referrers" report.

Answer: A,C,D

NEW QUESTION # 114

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