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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q51-Q56):

NEW QUESTION # 51

A new custom object has been created, and the records of this object will be created through integration with another system. What should a consultant do to ensure the data is loading into the correct fields in Financial Services Cloud?

- A. Ensure custom metadata is configured and each custom metadata record details where the data will be sent
- **B. Utilize a field mapping file with the external system (allocation and the corresponding field in Salesforce)**
- C. Create a junction object between the external system and the new customer object where the data will reside
- D. Use a CSV file with the data created and use Data Loader to map to the correct field

Answer: B

Explanation:

To ensure the data is loading into the correct fields in Financial Services Cloud, the consultant should utilize a field mapping file with the external system allocation and the corresponding field in Salesforce. A field mapping file is a file that specifies how fields from an external system map to fields in Salesforce. By using a field mapping file, the consultant can ensure that the data from the new custom object is imported into the correct fields in Financial Services Cloud and avoid any data loss or inconsistency.

NEW QUESTION # 52

To access all Financial Services Cloud (FSC) functionalities available out of the box, a consultant must install the FSC Managed Package and the Unmanaged Extension Packages.

Which two functionalities are included in the FSC Unmanaged Extension Packages?

- A. Custom objects to track Financial Accounts and Household
- **B. The Commercial Banking dashboard**
- **C. Field sets that configure how fields display in the client and household profiles**
- D. Predefined list views of clients and households

Answer: B,C

Explanation:

Reference: Financial Services Cloud Packages

Explanation: Financial Services Cloud functionality is available from two packages: the managed package and the unmanaged extension packages. The managed package contains most of the Financial Services Cloud functionality, such as custom fields and objects, list views and profiles of clients and households, and administrative configurations. The unmanaged extension packages provide additional functionality that is not included in the managed package, such as:

The Commercial Banking dashboard: This is a dashboard that provides insights into commercial banking activities and performance, such as loan portfolio health, deposit growth, referral pipeline, and customer satisfaction. The Commercial Banking dashboard is included in the unmanaged commercial banking extension package.

Field sets that configure how fields display in the client and household profiles: These are field sets that determine which fields are displayed in different sections of the client and household profiles, such as Client Overview, Household Overview, Client Details, Household Details, etc. The field sets are included in the unmanaged extension package.

NEW QUESTION # 53

How can the Salesforce Admin help agents who deal with a large number of customers on a daily basis, quickly scan the Life Events component and find the information they need without much effort?

- **A. The Admin can change the color of important life events to red.**
- B. The user can customize the order of life events to be set in chronological order
- C. The user can change the color of important life events to red.
- D. The Admin can customize the order of life events to be set in chronological order.

Answer: A

Explanation:

The Admin can change the color of important life events to red by using custom CSS in a Lightning App Builder theme layout component. This way, the agents can quickly scan the Life Events component and find the information they need without much effort. The color red can draw attention and indicate urgency or importance for certain life events.

NEW QUESTION # 54

A financial services company offers special deposit products for its employees. These employees have customer records in Salesforce so that they can be serviced like normal customers. Only customer service employees within a specific group should be able to see these special deposit products in Salesforce to protect the personal financial information of bank employees.

How should the administrator configure sharing rules in Financial Services Cloud to meet these requirements?

- **A. Create a Financial Account sharing rule based on criteria**
- B. Create an Account sharing rule based on record owner.
- C. Create Account sharing rules based on criteria.
- D. Create a Financial Account sharing rule based on record owner.

Answer: A

Explanation:

To meet the requirements of sharing special deposit products for employees, the administrator should create a Financial Account sharing rule based on criteria. A Financial Account sharing rule is a sharing rule that grants access to financial account records based on record owner or field values. A sharing rule based on criteria is a type of sharing rule that grants access to records that meet certain criteria. By creating a Financial Account sharing rule based on criteria, the administrator can share the special deposit products with the customer service employees within a specific group based on a field value that indicates the product type.

NEW QUESTION # 55

While working for an insurance client implementing Financial Services Cloud, an API integration between Salesforce and a risk control system has been configured. The consultant is asked to ensure the correct profiles and permissions were set up for this connection. Which two steps should the consultant take?

- A. Assign the integration user to the System Administrator profile.
- B. Update the System Administrator profile to include the API Only User.
- C. Create a new custom profile and ensure API Only is selected.
- D. Create a dedicated Integration User.

Answer: C,D

Explanation:

To ensure the correct profiles and permissions for an API integration between Salesforce and a risk control system, the consultant should do the following steps:

Create a dedicated Integration User that will be used to authenticate and authorize the API calls between Salesforce and the risk control system. The Integration User should have a unique username, password, and security token that are not shared with other users or systems. The Integration User should also have the minimum permissions and access settings required to perform the integration tasks.

Create a new custom profile and ensure API Only is selected. The API Only option restricts the user from logging in to the Salesforce user interface, but allows the user to access the Salesforce API. The custom profile should also have the appropriate object permissions, field-level security, record types, page layouts, and other settings that are relevant for the integration. The custom profile should be assigned to the Integration User.

NEW QUESTION # 56

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