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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q73-Q78):

NEW QUESTION # 73

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce Financial Services Cloud. When is the Referral Score updated?

- A. The Referral Score updated when a lead is created using the referral record type.
- B. The Referral Score updated when a referral is assigned from the queue to a user.
- C. The Referral Score updated when a referral is convened to an Opportunity or closed.
- D. The Referral Score updated when an opportunity associated with the Referral is Closed Won

Answer: D

Explanation:

The Referral Score is updated when an opportunity associated with the Referral is Closed Won. The Referral Score is a metric that measures the quality and quantity of referrals that a user creates or receives. The Referral Score is calculated as the number of referrals converted to opportunities divided by the total number of referrals. The Referral Score is displayed in the Referral Summary component on the user's Home page or record page. The Referral Score is updated whenever a referral is converted to an opportunity or an opportunity is closed as won or lost. Verified Reference: : Salesforce Help Article 2 : Salesforce Help Article 4

NEW QUESTION # 74

Which tool to use to import data exceeding 50,000?

- A. Data Loader
- B. Data Import Wizard

Answer: A

NEW QUESTION # 75

Lake Tahoe Bank SF admin is planning to migrate data into the new FSC org. The admin can control whether Rollup by Lookup (RBL) rules or record rollups are queried and calculated. Before initiating data insert or update operations, the admin wants to disable rollups to speed up data loading. Where in SF would the admin disabled rollups to accelerated loads? (1 correct answer)

- A. App Manager
- B. Object Settings
- C. Company Settings
- D. Custom Settings

Answer: D

NEW QUESTION # 76

A financial services company would like its users to be able to relate two business accounts. What should the administrator configure to meet the requirement?

- A. Update the Role picklist on the Account-Account Relationship object with new value.
- B. Create a new Contact Reciprocal Role for the required value.
- C. Update the Role picklist on the Account-Contact Relationship object with new value.
- D. Create a new Account Reciprocal Role for the required value.

Answer: A

Explanation:

To configure Financial Services Cloud to allow users to relate two business accounts, the administrator should update the Role picklist on the Account-Account Relationship object with new value. The Role picklist is a field on the Account-Account Relationship object that defines the type of relationship between two accounts, such as Household Member, Business Owner, Trustee, or Friend. The Role picklist is used to filter and display the account-account relationships in the Actionable Relationship Center (ARC). To update the Role picklist, you need to go to Setup > Object Manager > Account-Account Relationship > Fields & Relationships > Role and add or remove values according to your business needs. Verified References: : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 77

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 a Life Event for the birth of the child and a Referral for the Education Savings Account
- B. Create a Referral for the Banker for an Education Savings Account
- C. Create a Life Event for the birth of the child and a Financial Goal 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 two Life Events, one for the birth of the child and one for the Education Savings Account.

Answer: A,C

Explanation:

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 # 78

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