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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q48-Q53):

NEW QUESTION # 48

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the client onboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.
- **B. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.**
- C. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.
- **D. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.**

Answer: B,D

Explanation:

Explanation

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority⁴.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION # 49

Which three referral metrics are tracked with custom components included in Financial Services Cloud?

- A. My Top Referrers
- B. Expressed interests
- C. Web to Lead Referrals
- D. Referrals Assigned to me
- E. My Approved Referrals

Answer: A,B,D

Explanation:

The following referral metrics are tracked with custom components included in Financial Services Cloud:

Expressed interests: This metric shows the number of referrals that have a specific expressed interest, such as a mortgage, a credit card, or a checking account. You can use this metric to understand the customer needs and interests that generate the most referrals.

My Top Referrers: This metric shows the top referrers who have created referrals for you, ranked by the number of referrals and the conversion rate. You can use this metric to identify and appreciate your best sources of business.

Referrals Assigned to me: This metric shows the number of referrals that are assigned to you and their status, such as New, In Progress, or Closed. You can use this metric to monitor and manage your referral pipeline and prioritize your follow-up actions.

Verified Reference: : Salesforce Financial Services Cloud User Guide, page 40. : Salesforce Financial Services Cloud User Guide, page 41. : Salesforce Financial Services Cloud User Guide, page 42.

NEW QUESTION # 50

A consultant advising Cumulus Bank wants to ensure that the bank is compliant with Identity Verification Regulations when customers contact the bank.

Which two features should a consultant leverage to design this business process?

- A. Discovery Framework
- B. Omni Studio
- C. Screen Flows
- D. Process Builder

Answer: C,D

Explanation:

Process Builder and Screen Flows are two features that can be used to design a business process for identity verification. Process Builder is a tool that allows you to automate business processes by creating workflows that trigger actions based on certain criteria. Screen Flows are a type of flow that guide users through a series of screens to collect and update data. You can use Process Builder to launch a Screen Flow when a customer contacts the bank, and use the Screen Flow to capture and verify the customer's identity information.

References: [Process Automation], [Screen Flows]

NEW QUESTION # 51

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the client onboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.
- B. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.
- C. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.
- D. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.

Answer: B,D

Explanation:

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION # 52

What 3 options does the FSC application offer to view and update Account-Account, Account-Contact and Contact-Contact Relationships?

- A. Group Members Component
- B. Life Events Component
- C. Relationship Map
- D. Family Members Component
- E. Actionable Relationship Center

Answer: A,C,E

NEW QUESTION # 53

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Patrick lives in Westfield, Indiana, with Financial-Services-Cloud his wife and two Yorkies, The White Paper Company is embarking on developing a new warehouse, It's very helpful overall, especially Financial-Services-Cloud Exam Paper Pdf questions on redundancy methodologies and enterprise and campus networks.

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