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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q99-Q104):

NEW QUESTION # 99

What capability included in the Financial Services Cloud license can assist bankers in focusing on the most promising referrals?

- A. Einstein Referral Scoring for Financial Services Cloud
- B. Referral Approval Processes
- C. Referral Routing Rules
- **D. Intelligent Need-Based Referrals and Scoring**

Answer: D

Explanation:

Intelligent Need-Based Referrals and Scoring is a capability that helps bankers prioritize the most promising referrals by assigning a

score based on the client's needs, preferences, and interactions. It also helps bankers route referrals to the best suited specialists or advisors.

NEW QUESTION # 100

An administrator is logged into Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.

Assuming there are no other issues, what should happen when the administrator uploads the import file?

- A. The import will fail, since all records in Salesforce must have an owner.
- B. The import will succeed, and the Account Owner field will be left blank.
- C. The import will succeed, and the administrator will be prompted to select a user.
- **D. The import will succeed, and the administrator will be named as the default Account Owner.**

Answer: D

Explanation:

When using Data Loader to insert new records into Salesforce, if the Account Owner field is not specified in the import file, the default owner will be the user who is logged into Data Loader. In this case, since the administrator is logged into Data Loader with their own credentials, they will be assigned as the owner of all the new Business Account records. This behavior is consistent with the standard Salesforce rule that every record must have an owner.

References:

About Data Loader

Mass update Account ownership with Data Loader

NEW QUESTION # 101

If a client is associated with more than one Household or Group, where will this client's records get rolled up to?

- A. to the Household where the client is the primary member
- B. to the household with the client's primary address
- C. to all the parent households and groups
- **D. to the household selected by the advisor for record rollups.**

Answer: D

Explanation:

If a client is associated with more than one Household or Group, their records will get rolled up to the household selected by the advisor for record rollups. A Household or Group is a construct in Financial Services Cloud that allows you to group related accounts together and view their aggregated financial data and activities. A client can belong to multiple Households or Groups, but only one of them can be selected as their primary Group for record rollups. The primary Group determines which Household or Group will display the client's records in its summary components or related lists. The advisor can select or change the primary Group for a client using the Primary Group field on the client's record page. Verified References: : Salesforce Help Article 6

NEW QUESTION # 102

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m058 Which Financial Services Cloud object should a consultant recommend?

- A. Received Document
- B. Document Checklist Item
- C. Identity Document
- **D. Identification Document**

Answer: D

Explanation:

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and

country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

NEW QUESTION # 103

How can the Salesforce Administrator make sure that highly sensitive Life Events or Business Milestones will not be shown until the event actually happened?

- A. Delete the value from the Event Type picklist on the Life Event Object or the Milestone type on the Business Milestone object
- B. Remove the Event or Milestone from the Lightning Component in the Developer Console.
- C. Life Events are part of the FSC managed package, therefore the Salesforce Admin must contact Salesforce Support to remove the Event from the Lightning Component.
- **D. Hide the Event or Milestone on the Events & Business Milestones Lightning Component page properties.**

Answer: D

Explanation:

To hide highly sensitive Life Events or Business Milestones until they happen, the Admin can hide them on the Events & Business Milestones Lightning Component page properties. The Events & Business Milestones Lightning Component is a component that displays a timeline of life events and business milestones for a client or a group. The Admin can use the page properties to customize the component and select which event types or milestone types to show or hide on the timeline. Verified References: 2

NEW QUESTION # 104

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