

Test Financial-Services-Cloud Dumps Pdf | Valid Financial-Services-Cloud: Salesforce Financial Services Cloud (FSC) Accredited Professional



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Whatever may be the reason to leave your job, if you have made up your mind, there is no going back. By getting the Salesforce Financial-Services-Cloud Certification, you can avoid thinking about negative things, instead, you can focus on the positive and bright side of taking this step and find a new skill set to improve your chances of getting your dream job.

The Salesforce Financial-Services-Cloud Exam is known to be challenging, so candidates are advised to invest in resources to prepare for it. These resources can include official Salesforce training courses, various online study resources, and practice tests. A thorough understanding of Salesforce's terminology, functions, and features is essential to passing the exam.

Salesforce Financial Services Cloud (FSC) Accredited Professional Certification Exam is a credential designed to validate the skills and knowledge of professionals who work in the financial services industry. Salesforce Financial Services Cloud (FSC) Accredited Professional certification program is offered by Salesforce, a leading provider of customer relationship management (CRM) software solutions. The Salesforce FSC Accredited Professional Certification Exam is designed to test the proficiency of professionals in using the Salesforce Financial Services Cloud platform, which is specifically tailored to meet the needs of financial advisors and wealth management firms.

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Earning the FSC Accredited Professional certification can be a valuable asset for financial advisors and other professionals in the finance industry. Salesforce Financial Services Cloud (FSC) Accredited Professional certification demonstrates a candidate's expertise in using the Salesforce Financial-Services-Cloud platform, which can help them stand out in a competitive job market. Additionally, the certification can help companies identify candidates who are qualified to work with their financial clients.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample

Questions (Q19-Q24):

NEW QUESTION # 19

How can the Salesforce Admin change the configuration to summarize Financial Goals at the household level?

- A. Create a formula field and add it to the Account page layout
- **B. Update the selection in "Activities & Objects to Roll Up" to include Financial Goals**
- C. Add a custom Rollup By Lookup (RBL) rule.
- D. Financial Goals can not be summarized at the household level.

Answer: B

Explanation:

Explanation

To change the configuration to summarize Financial Goals at the household level, you need to update the selection in "Activities & Objects to Roll Up" to include Financial Goals. This option is available in Setup > Financial Services Settings > Activities & Objects to Roll Up. By selecting Financial Goals, you enable Group-Level Rollups for Financial Goals, which display the total number of goals, completed goals, and completion percentage of all the goals that belong to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 81.

NEW QUESTION # 20

The Salesforce Admin of Lake Tahoe Bank wants to implement Financial Services Cloud using the individual object model. What are the steps to disable person accounts?

- **A. Remove Person Account record types from the Individual Record Type Mapper.**
- **B. Disable the Person Account custom setting.**
- C. Assign the Person Account record type to the user profiles.
- D. Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
- **E. Assign the Individual record type to the user profiles.**

Answer: A,B,E

NEW QUESTION # 21

A Salesforce Admin is configuring a new Action Plan Template. One task in that template needs to be picked up by the next available Advisor. What assignment logic should the Admin use when configuring this template task?

- A. Role
- B. Action Plan Creator
- **C. Queues**
- D. Specific User
- E. Account Team

Answer: C

Explanation:

Explanation

To assign a task to the next available Advisor, the Admin should use Queues as the assignment logic when configuring the template task. Queues are collections of records that can be assigned to multiple users who share workloads and responsibilities. By using Queues, the Admin can ensure that any Advisor who is part of the Queue can pick up the task when they are available.

NEW QUESTION # 22

A company wants to convert its Salesforce Financial Services Cloud implementation from using the individual account model to using person accounts.

Which three things should a consultant do to prepare for the conversion?

- **A. Test out the conversion in a sandbox, including all integrations and customizations.**
- B. Ensure each account.phone field in the individual account record is blank.

- C. Update all opportunities linked to individual account records to be owned by the individual account record's owner.
- D. Ensure all individual account records to be converted are only linked to exactly one contact record.
- E. Ensure each individual account to be converted is not a parent account of any other account records.

Answer: A,D,E

NEW QUESTION # 23

The Salesforce Admin of Lake Tahoe Wealth Management Company needs to update an existing, published Action Plan Template to accommodate a change in the firm's annual client review process. What steps should the Admin take to make that change?

- A. Set the Action Plan Template to "Inactive" and then make changes to the template, as necessary.
- B. **Clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template.**
- C. Edit the published Action Plan Template directly.

Answer: B

Explanation:

Explanation

To update an existing, published Action Plan Template, the Admin should clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template. This is because published Action Plan Templates cannot be edited directly or set to inactive. Cloning an Action Plan Template creates a copy of it with a new name and ID, which can then be modified and published. Verified References: 4

NEW QUESTION # 24

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