Quiz Salesforce - Financial-Services-Cloud - Salesforce Financial Services Cloud (FSC) Accredited Professional– Trustable Exam Syllabus

04/01/2024, 23:28 Salesforce Financial Services Cloud (FSC) Accredited Professional - Financial-Services-Cloud Exam Questions [2024]

Limited Time Discount Offer! 15% Off - Ends in 01:43:22 - Use Discount Coupon Code P4TCOM2024

pass 4 test

Live Chat (https://mylivechat.com/chatnoscript.aspx?HCCID=66608068)

Home (/) Products (/allproducts.php) Certifications (/certifications.php) Free Demo (/samples.php)
Guarantee (/page_guarantee.html) How to pay? (/page_howtopay.html) F.A.Q (/page_faqs.html)
Cart (/cart.php) My Orders (/member.php?ac=myorder)

All Exams Practice Materials 10% OFF Discount Code: Off2sale

Salesforce Financial Services Cloud (FSC) Accredited Professional - Financial-Services-Cloud Exam Questions

QUESTION NO: 66
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? (Choose Three)

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

Hide answers/explanation

Correct Answer: A,D,E

Explanation
The following steps are required to disable Person Accounts and use the individual object model in Financial Services Cloud:
Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
You need to contact Salesforce Support to request the conversion from Person Accounts to the individual model. This is an irreversible process that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before requesting the conversion in production.
Remove Person Account record types from the Individual Record Type Mapper. You need to remove any Person Account record types that are mapped to individual record types in the Individual Record Type Mapper. This is a custom setting that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. You can access this setting by going to Setup > Financial Services Settings > Individual Record Type Mapper.
Assign the Individual record type to the user profiles. You need to assign the Individual record type to the user profiles that need to create or access individual records. The Individual record type is a standard record type on the Account object that represents an individual person who is not directly related to your business, such as a prospect, influencer, or household member. You can assign record types by going to Setup > Profiles > Object Settings > Accounts > Record Types. Verified References: : Salesforce Help Article 5 : Salesforce Help Article 6 : Salesforce Help Article 7

QUESTION NO: 67
Which three related lists are visible within the Actionable Relationship Center associated with the Account object?

- A. Notes and Attachments
- B. Financial Holdings
- C. Cases
- D. Client Financial Goals
- E. Household Financial Accounts

HAVE A QUESTION? CHAT NOW

Chat now

https://www.pass4test.com/Financial-Services-Cloud-exam-questions.html 1/3

P.S. Free 2026 Salesforce Financial-Services-Cloud dumps are available on Google Drive shared by Pass4training: https://drive.google.com/open?id=1DVbr06ih3CCDKPoE1MUdQH5JfjCqCK11

It is similar to the Financial-Services-Cloud desktop-based software, with all the elements of the desktop practice exam. This mock exam can be accessed from any browser and does not require installation. The Salesforce Financial-Services-Cloud questions in the mock test are the same as those in the real exam. And candidates will be able to take the web-based Salesforce Financial-Services-Cloud Practice Test immediately through any operating system and browsers.

Salesforce Financial Services Cloud (FSC) is an industry-specific CRM solution that helps financial institutions connect with their clients in a more personalized way. It is designed to help financial advisors manage their client relationships, financial planning, and investment management all in one place. FSC also provides tools for compliance, data security, and reporting, making it a comprehensive solution for financial services firms.

>> Financial-Services-Cloud Exam Syllabus <<

Financial-Services-Cloud Test Price - Free Financial-Services-Cloud Download

Our Financial-Services-Cloud exam questions are of high quality and efficient. We provide the client with the latest materials so that the client can follow the newest trends in theory and practice it so thus the client can pass the exam easily. Don't be hesitated and take action immediately! The study materials what we provide is to boost pass rate and hit rate, you only need little time to prepare and review, and then you can pass the Financial-Services-Cloud Exam. It costs you little time and energy, and you can download the software freely and try out the product before you buy it.

Salesforce Financial Services Cloud is a comprehensive platform designed specifically for financial service providers. It enables users to manage their clients, accounts, and financial products all in one place. The FSC Accredited Professional certification exam is designed to test your knowledge of this platform's features and capabilities. You will be tested on topics such as managing client relationships, financial products and services, and regulatory compliance. You will also be tested on your ability to configure, customize, and integrate the Financial Services Cloud platform to meet specific business needs.

Salesforce FSC Accredited Professional Certification Exam covers a range of topics related to the use of Salesforce Financial Services Cloud, including client management, financial planning, investment management, and compliance. Financial-Services-Cloud Exam is designed to assess the ability of professionals to use the platform to manage client relationships, track investment portfolios, and comply with industry regulations. It is also designed to test the proficiency of professionals in using the platform to generate reports, analyze data, and provide insights to clients.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q142-Q147):

NEW QUESTION # 142
A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A. Topics
- B. Engagement Topics
- C. Alerts
- D. Interest Tags

Answer: D

Explanation:
The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags. Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION # 143
The investor relations director of a large insurance company just published a press release after the company's Quarterly Earnings Call to report about its digital transformation implementing Salesforce Financial Services Cloud (FSC).
Which three value outcomes should the company's stakeholders expect?

- A. Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans
- B. Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC
- C. Automated claims orchestration via straight through processing workflow rules from OmniStudio with minimal human intervention from insurance adjusters or underwriters, allowing claims to be completed faster and at scale
- D. Streamlined the entire deal lifecycle with FSC. leveraging relationship maps and interaction history in business development/discovery D to accelerate pipe management and research
- E. Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from D the FSC HomeT\e

Answer: A,B,E

Explanation:
The following value outcomes should the company's stakeholders expect from implementing Salesforce Financial Services Cloud (FSC):
Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC. This outcome means that the company

improved its customer satisfaction (CSAT) and net promoter score (NPS) metrics by providing customized and relevant interactions with customers, reducing their waiting time by handling cases more efficiently, and offering self-service options through chatbots powered by artificial intelligence.
Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans. This outcome means that the company enhanced its customer onboarding process by speeding up and streamlining the document management and approval workflow using Action Plans, which are features that allow users to create templates for common client processes, such as account opening, loan application, or financial review.
Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from the FSC Home Page. This outcome means that the company increased its advisor productivity by providing them with a daily task list that shows their priorities and action items, a client life events component that shows important events in their clients' lives, an opportunities component that shows potential sales deals, and an aggregated household information component that shows a holistic view of their clients' financial situation, all on the FSC Home Page

NEW QUESTION # 144
A financial services company has found that more than two-thirds of customer onboarding processes are manually done by client specialists, consuming large amounts of time and resulting in errors in the sales process. The company contacts a consultant to learn how to leverage Financial Services Cloud features to improve the current state.
What should the consultant consider from a customer onboarding perspective?

- A. If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies. Action Plan can be used to improve the current state.
- B. If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies. Discovery Frameworkcan be used to improve the current state.
- C. If the company struggles with the low efficiency of tracking required documents for its customersand creating templates for checklists, Action Plan is recommended to improve the current state.
- D. If the company struggles with the low effi