

Salesforce Financial-Services-Cloud Question Explanations | Financial-Services-Cloud Mock Test



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>> **Salesforce Financial-Services-Cloud Question Explanations** <<

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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q44-Q49):

NEW QUESTION # 44

Which three standard fields are available to track a customer's retirement gial progress?

- A. Contributions
- B. Actual value
- C. Target value
- D. Target Date
- E. Total Value

Answer: B,C,D

NEW QUESTION # 45

A Bank of the Future customer calls the bank to update the address on their account. The call center agent handling the call needs to enter a new address into the system. The agent enters the new contact information using an OmniScript and then needs to generate a

prefilled PDF with the new address that can be shared with the customer.

Which two OmniStudio tools should a consultant recommend to generate the prefilled PDF?

- A. Integration Procedure
- **B. DataRaptor**
- C. Calculation Procedure
- **D. OmniStudio Action Document Generation**

Answer: B,D

Explanation:

Explanation

The following OmniStudio tools should be recommended to generate the prefilled PDF:

OmniStudio Action Document Generation, which is a tool that allows users to create documents from templates and data sources using OmniScripts and Integration Procedures. By using OmniStudio Action Document Generation, the consultant can create a document template with placeholders for the contact and address information and generate a PDF file from it using an OmniScript. DataRaptor, which is a tool that allows users to extract and transform data from Salesforce or external systems using Integration Procedures. By using DataRaptor, the consultant can create a data source that retrieves the contact and address information from Salesforce and maps it to the document template placeholders.

NEW QUESTION # 46

A financial services company needs to alert advisors about changes in client records that require action. What should the administrator consider when configuring Record Alerts?

- A. When the administrator adds a new Record Alert Category, the severity value in the alert category is the default value on the record alerts advisors create and cannot be changed.
- **B. With permissions for Record Alerts, users can create record alerts on all custom objects and standard objects such as Financial Account.**
- C. When the admin creates a value for the Severity field, the warning icon is associated with the field automatically, and advisors cannot change the icon.
- D. Record alert categories are not required when creating a record alert, but they help keep alerts organized.

Answer: B

Explanation:

Reference: Record Alerts APIs | Industries Common Resources Developer Guide | Salesforce Developers

Explanation: Record Alerts are a feature of Financial Services Cloud that allow users to create and display alerts on records that require action or attention. Record Alerts can help users prioritize their work, communicate important information, and collaborate with other users. Record Alerts can be created on any custom object or standard object that supports custom fields, such as Financial Account, Contact, or Opportunity.

To create record alerts, users need to have the following permissions:

Read and Edit access to the record that they want to create an alert for
Create access to the Record Alert object
Read access to the Record Alert Category object

NEW QUESTION # 47

What benefits do Flows for FSC offer to support customer onboarding?

- A. Flows enable customers to schedule appointments via customer communities, mobile apps, or websites.
- B. Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.
- **C. Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary without the need to navigate to different screens.**
- D. Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling
- E. Flows enable customers to schedule appointment via customer communities, mobile apps, or websites.

Answer: C

NEW QUESTION # 48

Which Salesforce Financial Services Cloud feature enables financial advisors to track and manage client accounts?

- A. Performance reporting
- **B. Financial accounts management**
- C. Opportunity management
- D. Client onboarding

Answer: B

Explanation:

Explanation

Financial accounts management is a Salesforce Financial Services Cloud feature that enables financial advisors to track and manage client accounts. A financial account is any account managed by a financial institution, such as a bank, an insurance company, or an investment firm. Financial Services Cloud supports many kinds of financial accounts, such as checking accounts, savings accounts, mortgages, credit cards, investment accounts, insurance policies, and more³. Financial advisors can use Financial Services Cloud to view, create, update, and delete financial accounts for their clients, as well as link them to other objects, such as households, goals, referrals, or opportunities⁴.

References:

Financial Accounts

Manage Financial Accounts

NEW QUESTION # 49

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