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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q153-Q158):

NEW QUESTION # 153

A financial services company must add details to the default business hours record. For company-wide holidays, the company wants the option to skip non-work days in Action Plan when setting task completion dates.

What should the administrator configure to meet the requirement?

- A. Omit the day's start and end time fields when the administrator wants to indicate a non- working day.
- B. Configure the day without business hours, it is considered a non-work day, even if the day is a recurring holiday.

- C. Add non-work days to the date offset when calculating the task completion date is automatic; no setup is required.
- D. Select Recurring Holidays as Action Plans and consider recurring holidays when determining the non-work days to skip.

Answer: B

Explanation:

Explanation

To skip non-work days in Action Plan when setting task completion dates, the administrator should configure the day without business hours, as it is considered a non-work day, even if the day is a recurring holiday. This means that the administrator should leave the start and end time fields blank for any day that is not a working day, such as Saturday or Sunday. Action Plans will then automatically omit those days when calculating the task completion dates based on the business hours¹. Recurring holidays are not considered by Action Plans when determining the non-work days to skip².

References:

Set Business Hours

Set Up Company-wide Holidays

NEW QUESTION # 154

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

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

Answer: A

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 # 155

While working for an insurance client implementing Financial Services Cloud, an API integration between Salesforce and a risk control system has been configured. The consultant is asked to ensure the correct profiles and permissions were set up for this connection. Which two steps should the consultant take?

- A. Update the System Administrator profile to include the API Only User.
- **B. Create a dedicated Integration User.**
- C. Assign the integration user to the System Administrator profile.
- **D. Create a new custom profile and ensure API Only is selected.**

Answer: B,D

Explanation:

To ensure the correct profiles and permissions for an API integration between Salesforce and a risk control system, the consultant should do the following steps:

Create a dedicated Integration User that will be used to authenticate and authorize the API calls between Salesforce and the risk control system. The Integration User should have a unique username, password, and security token that are not shared with other users or systems. The Integration User should also have the minimum permissions and access settings required to perform the integration tasks.

Create a new custom profile and ensure API Only is selected. The API Only option restricts the user from logging in to the Salesforce user interface, but allows the user to access the Salesforce API. The custom profile should also have the appropriate

object permissions, field-level security, record types, page layouts, and other settings that are relevant for the integration. The custom profile should be assigned to the Integration User.

NEW QUESTION # 156

Which is a feature of Chatter? (3 answers)

- A. Feeds
- B. Events
- C. Recommendations
- D. Bookmarks
- E. Notes

Answer: A,C,E

NEW QUESTION # 157

What benefits do Flows for Financial Services Cloud offer to support customer onboarding? (Choose Two)

- A. Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling
- B. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- C. Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.
- D. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- E. 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.

Answer: B,E

Explanation:

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. Flows can simplify and streamline the customer onboarding process by automating tasks and collecting information in an easy and intuitive way. You can use Flows to create service requests that capture the customer's details and update the related records in one place.

Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.

Flows can integrate with Experience Cloud sites, mobile apps, or websites to provide self-service options for customers. You can use Flows to create appointment scheduling forms that allow customers to book appointments with the right specialist at the right time and place. Verified References: :

Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 158

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