

Financial-Services-Cloud Latest Real Exam & Financial-Services-Cloud Valid Exam Answers



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Salesforce Financial Services Cloud (FSC) Accredited Professional Exam is a certification program designed for individuals who have a deep understanding of the Salesforce Financial Services Cloud platform. Financial-Services-Cloud Exam is intended for professionals who want to demonstrate their expertise in using Salesforce's cloud-based platform to manage financial services.

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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q86-Q91):

NEW QUESTION # 86

A marketing user has received a file of leads to import. What tool can be used to avoid duplicate leads?

- **A. Import Wizard**
- B. Data Loader
- C. Validation Rules
- D. Merge Leads function

Answer: A

NEW QUESTION # 87

Which two statements are true about Group Membership in Financial Services Cloud?

- A. Group Membership defines the role of the member within the Group.
- B. With Group Membership settings you can define who is the primary and who is the secondary member within the Group.
- C. With Group Membership settings you can define if a Group is the member's primary Group.
- D. Group Membership is modeled using the Account-Group Relationship object.

Answer: A,C

Explanation:

Group Membership is a construct in Financial Services Cloud that allows you to define the relationship between a group and its members. You can use Group Membership to specify the following information:

The role of the member within the group, such as Owner, Beneficiary, Trustee, etc.

Whether the group is the primary group for the member, which affects how financial data is rolled up and displayed. Verified

Reference: : Salesforce Financial Services Cloud User Guide, page 38.

NEW QUESTION # 88

Lake Tahoe Bank is rolling out Financial Services Cloud and the VP of IT is concerned about the cost of the licenses. The System Admin recommends using restricted licenses for users that need only limited access to Financial Service Cloud features. Which Financial Services Cloud permission set license enables user access to a license with contractual restrictions for Financial Services Cloud and can be used to grant restricted access to users like Bank Tellers?

- A. Client Segmentation
- B. Financial Service Cloud Extension
- C. Financial Service Cloud Basic
- D. Financial Services Cloud Standard

Answer: C

Explanation:

Explanation

To grant restricted access to users like Bank Tellers who need only limited access to Financial Services Cloud features, the Admin can use Financial Service Cloud Basic permission set license. This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL).

NEW QUESTION # 89

A commercial loan due diligence process is handled by multiple individuals at Lake Tahoe Bank. Lake Tahoe Bank wants an easy way for managers to distribute the work, to understand the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks. What FSC feature can Lake Tahoe Bank use to track this process?

- A. Action Plans
- B. Workflow Rules/Process Builder
- C. Flows
- D. Apex Triggers on the task object

Answer: A

Explanation:

Again, Action Plans are a feature that can help users track and manage common client processes. For a commercial loan due diligence process, users can create an Action Plan Template with tasks such as verifying income, checking credit history, appraising collateral, etc. Users can also assign different task owners and deadlines for each task to distribute the work and monitor the progress. Users can also use dashboards and reports to view the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

NEW QUESTION # 90

Lake Tahoe Bank's System Administrator is implementing intelligent Need-Based Referrals in Salesforce. Referrals are modeled on the Lead object. Which three Lead features can the System Admin use for Intelligent Need-Based Referrals?

- A. Einstein Lead Scoring
- B. Lead Approval
- C. Lead Assignment Rules
- D. Web to-Lead
- E. Lead Routing

Answer: A,C,E

Explanation:

The System Admin can use the following Lead features for Intelligent Need-Based Referrals:

Lead Routing, which is a feature that allows users to distribute leads to the right users or queues based on criteria such as lead source, industry, or product interest.

Lead Assignment Rules, which are rules that specify how to assign leads to users or queues when they are created manually, captured from the web, or imported via Data Import Wizard.

Einstein Lead Scoring, which is a feature that uses artificial intelligence to analyze historical data and predict how likely a lead is to convert. Einstein Lead Scoring assigns a score and an insight to each lead, which can help users prioritize and follow up on the most promising leads.

NEW QUESTION # 91

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