

Actual Financial-Services-Cloud Test - Financial-Services-Cloud Valid Test Notes



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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.

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Salesforce FSC Accredited Professional Exam is an online exam that consists of 60 multiple-choice questions. Financial-Services-Cloud exam duration is 90 minutes, and the passing score is 68%. Financial-Services-Cloud exam questions are designed to test the candidate's knowledge and understanding of Salesforce FSC, and the questions are based on real-life scenarios that financial professionals may encounter in their day-to-day work. Successful completion of the exam demonstrates that the candidate has a deep understanding of Salesforce FSC and can use the platform to provide effective financial services to their clients.

The FSC Accredited Professional Exam is an important credential for professionals who work in the financial services industry. It helps them to demonstrate their expertise in using the Salesforce Financial-Services-Cloud to manage client relationships, increase sales, and improve operational efficiency. Financial-Services-Cloud exam is also a great way for professionals to stay up-to-date with the latest trends and best practices in the financial services industry.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q15-Q20):

NEW QUESTION # 15

Scott Adams calls his Personal Banker Hank Burton to apply for a loan to buy a boat. Hanks wants to refer Scott to the loan department, but the current process is manual and time-consuming. Hank is asking the bank's System Administrator to automate

Referral creation in Salesforce. How can the Admin speed up and simplify Referral creation?

- **A. Use Global Action To create Referrals.**
- B. Use the Case process and create Cases with Case Type 'Referrar'.
- C. Use
- D. Write a trigger to create Referrals from a 'Create Referral*' button.

Answer: A

Explanation:

Explanation

To speed up and simplify Referral creation in Salesforce, the Admin can use Global Action to create Referrals.

Global Actions are actions that let users create records without leaving their current page or context. By using Global Actions, the Admin can enable Hank to create Referrals from any page in Salesforce, such as Chatter, Home, or Account pages. The Admin can also customize the layout and fields of the Global Action to capture only relevant information for Referrals

NEW QUESTION # 16

A retail bank is using Financial Services Cloud to support its operations. The bank has received complaints that its clients' documentation is often submitted late and when clients call, customer service agents are struggling with multiple systems to determine where the documentation is.

Which solution should a consultant suggest the client explore?

- **A. The Send Documents flow for Retail Banking**
- B. Process Builder to create automatic document requests for missing items
- C. An APEX solution to leverage the SendMail capabilities of Salesforce
- D. A Marketing Cloud integration to manage client communications

Answer: A

Explanation:

Explanation

The solution that the consultant should suggest the client explore to improve its clients' documentation submission and tracking is the Send Documents flow for Retail Banking. The Send Documents flow for Retail Banking is a prebuilt flow that allows users to send documents requests to clients via email and track the status of the requests in FSC. The flow uses DocuSign eSignature integration to enable clients to sign and return documents electronically. By using the Send Documents flow for Retail Banking, the consultant can help the client streamline and simplify its document management process and improve its customer service agents' efficiency

NEW QUESTION # 17

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- A. Disable the Primary Group setting for Scott on the Adams Household
- B. Make the Adams Household Scott's primary Group and make Scott the primary member
- C. Add Scott as a Related Contact to the Adams Household.
- **D. Make the Adams Household Scott's primary Group and edit the Activities & Objects to flip Up.**

Answer: D

NEW QUESTION # 18

A financial services company needs a custom field for reporting when relating two business accounts to each other. Which object should the administrator configure the custom field on?

- A. Contact-Contact Relationship
- B. Account-Contact Relationship
- C. Account
- **D. Account-Account Relationship**

Answer: D

Explanation:

To configure a custom field for reporting when relating two business accounts to each other, the administrator should configure the custom field on the Account-Account Relationship object. The Account-Account Relationship object is a custom object in Financial Services Cloud that allows you to create and manage relationships between two accounts, such as Household Member, Business Owner, Trustee, or Friend. You can use the Account-Account Relationship object to store additional information about the relationship between two accounts, such as role, start date, end date, or status. You can also use the Account-Account Relationship object to report on the account-account relationships and analyze their impact on your business. Verified Reference: : Salesforce Help Article [4] : Salesforce Help Article [5]

NEW QUESTION # 19

Universal Containers uses a custom field on the account object to capture the account credit status. The sales team wants to display the account credit status on opportunities.

Which feature should a system administrator use to meet the requirements?

- A. Look-up Field
- **B. Cross-object formula field**
- C. Workflow field update
- D. Roll-up summary field

Answer: B

NEW QUESTION # 20

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