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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q129-Q134):

NEW QUESTION # 129

Financial Services Cloud (FSC) contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. For example, if a consultant wanted to create a financial goal for a customer, they could use the Financial Goal object in FSC.

What are three objects in FSC?

- A. Revenue
- B. Financial Holding
- C. Billing
- D. Financial Goal
- E. Inheritance

Answer: A,B,D

Explanation:

Financial Services Cloud contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. Some of the custom objects are:

Financial Goal: An object that represents a client's financial objective, such as saving for retirement, buying a house, or paying off debt. A financial goal has fields to store information, such as name, amount, target date, priority, and status.

Financial Holding: An object that represents a holding in an investment account, such as a security, a mutual fund, or a bond. A financial holding has fields to store information, such as symbol, shares, price, gain/loss, and market value.

Revenue: An object that represents revenue generated from a client's financial accounts, such as an increase in stock value, a dividend payment, or an interest income. A revenue has fields to store information, such as type, amount, date, and source.

References:

Financial Services Cloud Associated Objects

Learn About the Financial Services Cloud Data Model

NEW QUESTION # 130

What feature does a Salesforce Administrator need to enable so users can see all the referrals for the members of a group?

- A. ReferralGroup Process Builder
- B. Group Member Referrals
- C. Referral Scoring
- D. Referrals Rollups

Answer: D

Explanation:

Referrals Rollups is a feature that enables users to see all the referrals for the members of a group, such as a branch or a team. It also allows users to filter referrals by status, priority, or owner.

NEW QUESTION # 131

A financial institution has custom security and visibility rules where certain users need to see specific records even though they are not typically engaged in that Account. This includes legal and compliance members who must be engaged for particular deals. Which Financial Services Cloud capability provides the ability to accommodate this request?

- A. Interaction Summaries
- B. Custom Sharing Rules
- C. Compliant Data Sharing
- D. Business Rules Engine

Answer: C

Explanation:

The Financial Services Cloud capability that provides the ability to accommodate the request of sharing specific records with certain users who are not typically engaged in that account is Compliant Data Sharing.

Compliant Data Sharing is a feature that allows users to share records with other users based on criteria such as record type or field value. Users can create sharing rules for objects such as account, contact, individual, financial account role, opportunity participant role, or case team role. By using Compliant Data Sharing, the financial institution can share records with legal and compliance members who must be engaged for particular deals based on a field value that indicates the deal type.

NEW QUESTION # 132

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

Answer: A,D

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 # 133

An administrator is logged into Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.

Assuming there are no other issues, what should happen when the administrator uploads the import file?

- A. The import will fail, since all records in Salesforce must have an owner.
- B. The import will succeed, and the administrator will be prompted to select a user.
- C. The import will succeed, and the Account Owner field will be left blank.
- **D. The import will succeed, and the administrator will be named as the default Account Owner.**

Answer: D

Explanation:

When using Data Loader to insert new records into Salesforce, if the Account Owner field is not specified in the import file, the default owner will be the user who is logged into Data Loader. In this case, since the administrator is logged into Data Loader with their own credentials, they will be assigned as the owner of all the new Business Account records. This behavior is consistent with the standard Salesforce rule that every record must have an owner.

References:

About Data Loader

Mass update Account ownership with Data Loader

NEW QUESTION # 134

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