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To become certified, candidates must pass a 90-minute online exam consisting of 60 multiple-choice questions. Financial-Services-Cloud exam covers various topics related to financial services, including client onboarding, financial accounts and transactions, financial planning, and compliance and security. Salesforce Financial Services Cloud (FSC) Accredited Professional certification is valid for two years and requires candidates to complete maintenance modules to keep up with the latest industry trends.

Salesforce Financial-Services-Cloud (FSC) Accredited Professional Certification Exam is a valuable certification for professionals working in the financial services industry. It validates your skills and knowledge in using Salesforce to manage client relationships, financial accounts and transactions, and compliance and security. By obtaining this certification, you can improve your career prospects and demonstrate your commitment to staying up-to-date with the latest industry trends.

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The Salesforce Financial-Services-Cloud exam covers various topics such as setting up the Financial Services Cloud, working with clients, managing financial accounts and data, and using the platform to provide financial advice and guidance. Financial-Services-Cloud Exam also tests the candidate's ability to customize the platform to meet the needs of their clients and to create reports and dashboards to help clients make informed financial decisions.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q142-Q147):

NEW QUESTION # 142

Which of the following are FSC components that visualize groups and relationships in Lightning pages? (Check the 2 that apply)

- A. Person Life Events
- B. Goal to Group Member Mapping
- C. Related Accounts
- D. Relationship Map and Group Builder

Answer: C,D

NEW QUESTION # 143

Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Residential Loan Application
- B. Contact
- C. Lead
- D. Opportunity
- E. Account

Answer: A,D,E

Explanation:

The following records support Document Checklist Items out of the box in Financial Services Cloud:

Account: An Account is a record that represents a person or an organization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.

Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.

Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services. You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes, or agreements. Verified Reference: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 144

Which 3 options does the Financial Services Cloud application offer to view and update Account-Account.

Account-Contact, and Contact-Contact Relationships?

- A. Family Members Component
- B. Group Members Component
- C. Actionable Relationship Center
- D. Life Events Component
- E. Relationship Map

Answer: B,C,E

NEW QUESTION # 145

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

Answer: A,C

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 # 146

When converting a lead, how can an administrator capture custom lead data on the converted contact?

- A. Map custom lead field to the standard lead field
- **B. Map custom lead fields to custom contact fields**
- C. Use the lead conversion wizard to select the fields
- D. Use the data loader to move the custom lead data

Answer: B

NEW QUESTION # 147

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