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Salesforce Financial Services Cloud (FSC) is a comprehensive customer relationship management (CRM) platform designed specifically for financial service providers. It is a powerful tool that helps to streamline customer interactions, track financial goals, and manage financial planning. The Salesforce Financial Services Cloud (FSC) Accredited Professional Certification Exam is designed to validate the skills and knowledge required to effectively implement and manage the FSC platform.

Obtaining the Salesforce Financial Services Cloud (FSC) Accredited Professional Certification demonstrates a high level of

expertise in the FSC platform, and can lead to increased career opportunities and higher salaries. It is also an indication to employers that the candidate has the skills and knowledge required to effectively manage the FSC platform, and can be trusted to implement and manage the platform in a professional and efficient manner.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q121-Q126):

NEW QUESTION # 121

A financial services company needs to capture a new type of referral that has different required fields than what is currently configured in the org.

Which three steps should the administrator take to configure Financial Services Cloud correctly based on the scenario?

- A. Create a new record type Referral on the Lead object.
- B. Create a custom Referral object.
- C. Create a new referral record type mapper record.
- D. Assign the record type to users.
- E. Update the lead page layout.

Answer: A,D,E

Explanation:

The following steps should be taken by the administrator to configure Financial Services Cloud correctly based on the scenario:
Assign the record type to users. You need to assign the new record type to the user profiles or permission sets that need to create or access referrals of that type. You can assign record types by going to Setup > Profiles > Object Settings > Leads > Record Types or Setup > Permission Sets > Object Settings > Leads > Record Types.

Create a new record type Referral on the Lead object. You need to create a new record type on the Lead object and name it Referral. You can use this record type to distinguish referrals from other types of leads and apply different page layouts, business processes, or validation rules for referrals.

Update the lead page layout. You need to update the page layout for the Referral record type and add or remove fields according to the requirements. You can also make some fields required or read-only on the page layout level. You can edit page layouts by going to Setup > Object Manager > Lead > Page Layouts. Verified Reference: : Salesforce Help Article 3 : Salesforce Help Article [4] : Salesforce Help Article [5]

NEW QUESTION # 122

What type of record access can an administrator grant (2 answers)

- A. Read/Write only
- B. Read only
- C. Read/Write/Transfer
- D. Read/Write/Delete

Answer: A,B

NEW QUESTION # 123

Which one of the following statements is not correct about Action Plans?

- A. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing.
- B. Capture repeatable tasks in templates and then automate the task sequences with an action plan.
- C. Automatically schedule the next appointment with the Advisor
- D. Manage customer engagements consistently and collaboratively with automated and compliant task orchestration.

Answer: C

NEW QUESTION # 124

What are two language-related limitations of Financial Services Cloud?

- A. Custom component labels are supported only in English.
- B. Predefined reciprocal roles are available only in English.
- C. Referral record type labels are supported only in English.
- D. Flows are available only in English.

Answer: B,C

Explanation:

Predefined reciprocal roles are available only in English and Referral record type labels are supported only in English are two language-related limitations of Financial Services Cloud. Predefined reciprocal roles are the roles that define the relationship between two individual clients or between an individual client and a group.

For example, Spouse, Child, Parent, etc. These roles are not translated into other languages and cannot be edited or deleted.

Referral record type labels are the labels that indicate the type of referral, such as Client Referral or Prospect Referral. These labels are also not translated into other languages and cannot be edited or deleted. References: [Predefined Reciprocal Roles], [Referral Record Type Labels]

NEW QUESTION # 125

What can be done with a workflow field update action? (2 answers)

- A. Apply a specific value to a field
- B. Change the record type of a record
- C. Update the value of a formula field
- D. Update the value of a field on a child object

Answer: A,B

NEW QUESTION # 126

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