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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q82-Q87):

NEW QUESTION # 82

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
- B. Write a trigger to create Referrals from a 'Create Referral*' button.
- C. Use Global Action to create Referrals.

- D. Use the Case process and create Cases with Case Type 'Referrar'.

Answer: C

NEW QUESTION # 83

A wealthy client owns a boutique shoe store called Smith's Shoes. Their financial advisor would like to add this relationship to the Financial Services Cloud (FSC) to track the complete picture of relationships related to the wealthy client's household.

Which three options should the Financial Services Cloud consultant use when mapping this relationship in FSC?

- A. Account object - Business record type
- B. Contact object
- C. Account Contact Relationship object
- D. Account Account Relationship object
- E. Account object - Household record type

Answer: A,D,E

NEW QUESTION # 84

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce Financial Services Cloud.

When is the Referral Score updated?

- A. The Referral Score updated when an opportunity associated with the Referral is Closed Won
- B. The Referral Score updated when a referral is converted to an Opportunity or closed.
- C. The Referral Score updated when a referral is assigned from the queue to a user.
- D. The Referral Score updated when a lead is created using the referral record type.

Answer: A

Explanation:

Explanation

The Referral Score is updated when an opportunity associated with the Referral is Closed Won. The Referral Score is a metric that measures the quality and quantity of referrals that a user creates or receives. The Referral Score is calculated as the number of referrals converted to opportunities divided by the total number of referrals. The Referral Score is displayed in the Referral Summary component on the user's Home page or record page. The Referral Score is updated whenever a referral is converted to an opportunity or an opportunity is closed as won or lost. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 4

NEW QUESTION # 85

During a Financial Services Cloud implementation at an insurance company, a consultant needs to design a broker data model for the broker web portal. The given requirements are:

1. Brokers are treated individually, even if they are associated with the same company.
2. Brokers should never have access to other brokers' data.
3. Brokers can nominate their assistants to access the broker portal.
4. An assistant can sometimes work for multiple brokers.

Which two considerations should the consultant consider regarding the data model?

- A. Brokers should be modeled as Contact and the Broker company should be modeled as Account, even if they're a legal entity '-' individually.
- B. The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers.
- C. The Broker Assistant should be modeled as a Contact. Then, use Contact to Contact association if they need work for multiple D Brokers.
- D. Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group 1-1 Account to model their company.

Answer: B,D

Explanation:

Explanation

The following considerations should be considered regarding the data model for the broker web portal:

The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers. This is because Contacts are records that represent individuals who are associated with an account. By using Contacts, the consultant can capture the personal information of the broker assistants and relate them to their employers. By using Contact to Multiple Accounts features, the consultant can enable a contact to have relationships with multiple accounts and specify different roles and start and end dates for each relationship.

Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group to model their company. This is because Accounts are records that represent business entities or organizations that are involved in business transactions with your company. By using Accounts, the consultant can capture the business information of each broker and treat them as legal entities in Salesforce. By using Contacts, the consultant can capture the personal information of each broker and relate them to their accounts. By using Groups, which are records that represent collections of accounts or contacts that share financial goals or characteristics, the consultant can model the broker company and associate multiple brokers with it

NEW QUESTION # 86

A system administrator at a financial services company wants to build a report to show Interest Tags. Which two things should the administrator consider when configuring the report?

- A. The user must build a report using the Topics object to view Interest Tags in the report.
- **B. To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name.**
- **C. When the user defines the custom report type, Topics should be selected as the Primary Object.**
- D. When the user defines the custom report type, Tag Categories should be selected as the Primary Object.

Answer: B,C

Explanation:

Interest Tags are a feature of Financial Services Cloud that let users add custom tags to client records to capture client needs, interests, and prospecting opportunities. Some of the things to consider when configuring a report to show Interest Tags are: When the user defines the custom report type, Topics should be selected as the Primary Object. Topics is the standard Salesforce object that stores the Interest Tags data⁴. The user can then add other objects as secondary objects, such as Accounts, Contacts, or Opportunities.

To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name. For example, to show only Interest Tags related to Accounts, the user can add a filter for Entity Type equals Account⁵.

References:

Interest Tags

Build an Interest Tags Report

NEW QUESTION # 87

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