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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q66-Q71):

NEW QUESTION # 66

Where should a Salesforce Administrator go to add custom icons to the Life Events and Business Milestones?

- A. Setup > User Interface > icons > Life Events and Business Milestones
- B. Lightning PageLayout > Life Events and Business Milestones Lightning Component > Page Icon Properties
- C. Setup > Financial Services > Icons > Life Events and Business Milestones
- D. Setup > Custom Code > Static Resources

Answer: D

Explanation:

To add custom icons to the Life Events and Business Milestones, you need to upload them as static resources in Setup > Custom Code > Static Resources. You also need to update the Icon Name field on the Life Event and Business Milestone objects to match the name of the static resource. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 58.

NEW QUESTION # 67

What will happen when a user attempts to log in to Salesforce from an IP outside the users profile but within the organization-wide trusted IP range?

- A. The user will be able to log in after answering the security question.
- B. The user will be able to log in without activating the computer.
- C. The user will be able to log in after the computer is activated.
- D. The user will not be able to log in at all.

Answer: D

NEW QUESTION # 68

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. 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.
- C. 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.
- D. The Broker Assistant should be modeled as a Contact. Then, use Contact to Contact association if they need work for multiple D Brokers.

Answer: B,C

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 # 69

Where should a Salesforce Administrator go to add custom icons to the Life Events and Business Milestones?

- A. Setup > Custom Code > Static Resources
- B. Setup > Financial Services > Icons > Life Events and Business Milestones
- C. Lightning Page Layout > Life Events and Business Milestones Lightning Component > Page Icon Properties
- D. Setup > User Interface > icons > Life Events and Business Milestones

Answer: D

NEW QUESTION # 70

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. Inheritance
- C. Billing
- D. Financial Holding
- E. Financial Goal

Answer: A,D,E

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 # 71

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