Salesforce

Financial-Services-Cloud

Salesforce Financial Services Cloud Accredited Professional Exam

Latest Version: 18.3

Question: 1

[FSC Data Model and Configuration]
What steps does the SalesforceAdministrator have to take to create a new Business Milestone Type?

A. In the Object Manager go to the Business Milestone object and create a new field using the name of the new milestone.
B. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
C. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field
D. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component

Answer: C

Question: 2

[FSC Data Model and Configuration]
Where should a Salesforce Administrator go to add custom icons to the Life Events and Business Milestones?

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

Answer: B

Question: 3

[FSC Data Model and Configuration]
What actions can a Wealth Advisor take from the Life Events card7

A. Create Case
B. Create Lead & Referral
C. Open an Account
D. Request Record Approval

E. Create Opportunity

Answer: B,D,E

Question: 4

[FSC Features and Functionality]
Planter Farm Credit Union provides loan and insurance products to farmers who operate individually as well as in collaboration with other neighboring farms & farmers. The collaboration can be seasonal or for a limited timeframe. What construct in Financial Services Cloud is most appropriate to represent such collaborative customer business operations?

A. Contact-Contact Relationship
B. Custom Relationship Group
C. Account with Record Type = Business
D. Standard Household

Answer: B

Question: 5

[FSC Data Model and Configuration]
What should a Financial Advisor use to model the relationship between a business contact and a client that is modeled as a person account?

A. Account-Account Relationship
B. Contact-Contact Relationship and the Reciprocal Rote
C. Reciprocal Role
D. Account-Contact Relationship and the Reciprocal Role

Answer: B