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NEW QUESTION: 1

A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories.

Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?

- A. Add the Financial Account List component to the Account Lightning record page.
- B. Configure the Financial Account List components for each required category.
- C. Create Account lookup fields on the Financial Account object to link the Financial Accounts to an Account.
- D. Create a custom picklist on the Financial Account object to track the Typ
- E. Configure Financial Account record types to match the required categories.

Answer: B,C,D (LEAVE A REPLY)

Explanation

The following considerations should be included when configuring the report with branch management reportable objects:

Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.

The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial Services Cloud. Banker is an object that represents a banker or an employee who works at a branch unit.

Branch Unit is an object that represents a physical location where bankers provide services to customers.

Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.

When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects.

NEW QUESTION: 2

Lake Tahoe Bank is implementing Financial Services Cloud. The bank's new business processes require that Financial Advisors can add individuals to more than one Group or Household using Multiple Relationship Groups. Where do Admins enable Multiple Relationship Groups?

- A. Object Settings
- B. Custom Settings
- C. Lightning Page Editor
- D. Profiles

Answer: ([SHOW ANSWER](#))

Explanation

To enable Multiple Relationship Groups, which is a feature that allows users to add individuals to more than one group or household, the Admin needs to use Custom Settings. Custom Settings are similar to custom objects and enable application developers to create custom sets of data, as well as create and associate custom data for an organization, profile, or specific user. The Admin can use Custom Settings to enable Multiple Relationship Groups by following these steps:

From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.

Click Manage next to Group Member Record Type Mapper.

Click Edit next to Default Organization Level Value.

In Multiple Relationship Groups Enabled, select True.

Click Save.

NEW QUESTION: 3

How should developers configure customized nodes for display in ARC?

A. Select Use LWC from the node Display tab to show the node in a Lightning Web Component

B. Reference the Lightning WebComponent in the Display properties of the custom ARC relationship graph

C. Select Use FlexCard from the node Display tab to show the node in a FlexCard

D. Reference the FlexCard in the Display properties of the custom ARC relationship graph

Answer: (SHOW ANSWER)

Explanation

To configure customized nodes for display in ARC, developers should reference the Lightning Web Component in the Display properties of the custom ARC relationship graph. A Lightning Web Component is a custom framework for creating reusable web components that run natively in browsers and leverage modern web standards. A custom ARC relationship graph is a metadata type in Financial Services Cloud that defines how account-account relationships are displayed in ARC, such as node shape, color, size, label, or icon. You can use Lightning Web Components and custom ARC relationship graphs to create customized nodes for ARC that show additional information or functionality for each account. Verified References: : Salesforce Help Article [9] : Salesforce Help Article [10]

NEW QUESTION: 4

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- B. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.
- C. Create a custom object to track client's financial data
- D. Use Process Builder to create a workflow to summarize data at the Person Account level.

Answer: B (LEAVE A REPLY)

Explanation

A Primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use Primary Group to roll up financial data from all the financial accounts that are related to the client or the group. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION: 5

A consultant is working with a new customer and has gained a firm understanding of their business processes and systems in preparation for implementing Salesforce Financial Services Cloud.

What should the consultant create as a deliverable for the current state business process?

- A. Word document telling the story of the process from the user's perspective
- B. An Excel spreadsheet with steps of the process as rows, and systems and personas in columns

C. An end-to-end visual map of the process using personas, systems, inputs, and outcomes

D. A Powerpoint deck with screenshots of the current systems and callouts to what is happening on each slide

Answer: (SHOW ANSWER)

Explanation

To document the current state business process for implementing Salesforce Financial Services Cloud, the consultant should create an end-to-end visual map of the process using personas, systems, inputs, and outcomes. A visual map is a tool that can help illustrate the flow of a business process from start to finish, showing the steps, decisions, and dependencies involved in each stage. A visual map can also include personas, systems, inputs, and outcomes to provide more context and detail for each step of the process.

Personas are fictional characters that represent the different roles or users that participate in or interact with the process. Systems are the tools or applications that are used to perform or support the process. Inputs are the data or information that are required or provided for each step of the process. Outcomes are the results or outputs that are achieved or delivered by each step of the process. Verified References: : Salesforce Help Article 3 : Salesforce Help Article [4]

NEW QUESTION: 6

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m 058 Which Financial Services Cloud object should a consultant recommend?

A. Document Checklist Item

B. Received Document

C. Identification Document

D. Identity Document

Answer: C (LEAVE A REPLY)

Explanation

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

NEW QUESTION: 7

Which two limitations should a Salesforce Administrator consider before enabling Person Accounts?

- A. Person Accounts can be enabled and disabled only by contacting Salesforce Support
- B. Person Accounts cannot be disabled once they were enabled
- C. Creating a client record via Salesforce Inbox is not supported.
- D. AppExchange packages will not work if Person Accounts are enabled

Answer: (SHOW ANSWER)

Explanation

The following limitations should be considered before enabling Person Accounts in Financial Services Cloud:

Person Accounts cannot be disabled once they were enabled. Enabling Person Accounts is an irreversible action that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before enabling it in production.

Creating a client record via Salesforce Inbox is not supported. Salesforce Inbox is a feature that allows you to access Salesforce data and actions from your email application.

However, you cannot use Salesforce Inbox to create a client record as a Person Account.

You can only create a client record as an Individual Model record using Salesforce Inbox.

Verified References: : Salesforce Help Article 4 :

Salesforce Help Article 5

NEW QUESTION: 8

Which three record type options should an advisor configure for a Lead object configuration?

- A. Retirement Planning
- B. Referral
- C. Opportunity
- D. General
- E. Adjustments

Answer: A,B,D (LEAVE A REPLY)

NEW QUESTION: 9

Which three things must an admin keep in mind when creating Action Plan Templates?

- A. When creating Action Plan Templates with the UI, you can designate a plan owner different from the plan creator.
- B. When you create an Action Plan from a template for a specific target record, the plan creator can choose whether the date calculation is based on calendar or working days.
- C. An Action Plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template.

D. When you create an Action Plan from a template for a specific target record, item deadlines are calculated using the start date and date offset " defined in the Action Plan Template

E. The Action Plan Template permission set must be added to all users that want to use Action Plans.

Answer: ([SHOW ANSWER](#))

Explanation

The following things must be kept in mind when creating Action Plan Templates:

When creating Action Plan Templates with the UI, you can designate a plan owner different from the plan creator. The plan owner is the user who is responsible for executing the tasks in the Action Plan.

The plan creator is the user who creates the Action Plan Template or the Action Plan from the template.

You can assign a different plan owner for each Action Plan Template or Action Plan.

An Action Plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template. An Action Plan Template is a reusable blueprint that defines the tasks, owners, and deadlines for a common business process or service request. An Action Plan is a specific implementation of the template that applies to a particular target record, such as an account, contact, or opportunity.

When you create an Action Plan from a template for a specific target record, item deadlines are calculated using the start date and date offset defined in the Action Plan Template. The start date is the date when you create the Action Plan from the template.

The date offset is the number of days before or after the start date when each task is due.

You can specify different date offsets for each task in the template. Verified References: :

Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION: 10

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: ([SHOW ANSWER](#))

Explanation

A Custom Relationship Group is a construct in Financial Services Cloud that allows you to model complex and dynamic relationships between clients and accounts. You can use it to

represent collaborative customer business operations that are not captured by standard household or account structures. Verified References: :
Salesforce Financial Services Cloud Implementation Guide, page 67.

NEW QUESTION: 11

What 2 considerations should the Salesforce Administrator review before implementing Flow for customer onboarding?

- A.** Use Field Level Security on Milestones
- B.** Flow for Financial Service Cloud is not available for the Individual Object Model.
- C.** Flow Screen Input Components can only be used in Financial Service Cloud Flow Templates
- D.** The Flow users require a Flow Permission Set License.

Answer: ([SHOW ANSWER](#))

Explanation

The following considerations should be reviewed before implementing Flow for customer onboarding:

Use Field Level Security on Milestones, which is a setting that controls whether users can view and edit fields on records. The Admin should use Field Level Security to restrict access to the Milestones field on the Flow Template object, which is used to track the progress of customer onboarding flows².

Flow for Financial Service Cloud is not available for the Individual Object Model, which is an alternative data model that uses the Individual object instead of Person Accounts to store information about people. Flow for Financial Service Cloud only supports Person Accounts as the primary object for customer onboarding flows². Verified References: 2

NEW QUESTION: 12

Which two statements are true for a Group in Financial Services Cloud?

- A.** Financial Services Cloud includes a group record type for households
- B.** A group is a type of account record that people and businesses can be related to through the Financial Account relationship object
- C.** A group is a type of account record that people and businesses can be related to through the account contact relationship object.
- D.** Financial Services Cloud includes a group record type for businesses

Answer: ([SHOW ANSWER](#))

Explanation

The following statements are true for a Group in Financial Services Cloud:

Financial Services Cloud includes a group record type for households, which is a record type that represents a collection of individuals who share financial goals, such as family members or roommates.

A group is a type of account record that people and businesses can be related to through the account contact relationship object, which is a junction object that links an account to a contact or an individual and defines their role or relationship with that account.

NEW QUESTION: 13

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify a published Action Plan to support an additional task she needs in order to complete an annual review for a client. How should Jen do this?

- A.** Use the 'task creator' tool to create a new task and associate with the existing Action Plan
- B.** Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.
- C.** Use the Action Plan item feature to add an additional task to a published Action Plan.
- D.** Create an independent Task not related to original Action Plan

Answer: C (LEAVE A REPLY)

Explanation

To modify a published Action Plan to support an additional task, Jen should use the Action Plan item feature to add an additional task to the published Action Plan. An Action Plan item is a construct in Financial Services Cloud that allows you to add, edit, or delete tasks in an existing Action Plan. You can use Action Plan items to customize your Action Plans according to your specific needs and preferences. Verified References: :
Salesforce Help Article 1

NEW QUESTION: 14

Cumulus Cloud Bank must provide its customer service staff with real-time access to customer accounts, including the ability to view current transactions and balances. As a result, the bank expects a high volume of concurrent users at peak times.

Which option is most suitable?

- A.** Use the Data Consumption Framework to connect to the bank's middleware.
- B.** Use Salesforce Connect with External Objects to expose tables from the bank's core systems, and use custom Lightning web components to surface them in the Salesforce Lightning UI.
- C.** Use Salesforce Connect with External Objects to expose tables from the bank's core systems, and use the standard user interface (UI) components to surface the records in Salesforce Lightning UI.
- D.** Embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make callouts to the core system services.

Answer: D (LEAVE A REPLY)

Explanation

The most suitable option for Cumulus Cloud Bank to provide its customer service staff with real-time access to customer accounts, including the ability to view current transactions

and balances, is to embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make callouts to the core system services. This option allows the bank to leverage the Lightning Platform features and capabilities, such as Lightning web components, Apex, and callouts, to create a seamless and performant integration with their core systems. By using custom Lightning web components, the bank can create custom user interfaces that display the data from the core systems on the Account and Financial Account pages. By using custom Apex, the bank can write code that makes callouts to the core system services using HTTP requests and responses, and handle any authentication, error handling, or data transformation logic.

NEW QUESTION: 15

A financial services company would like its users to be able to relate two business accounts. What should the administrator configure to meet the requirement?

- A.** Create a new Contact Reciprocal Role for the required value.
- B.** Update the Role picklist on the Account-Account Relationship object with new value.
- C.** Create a new Account Reciprocal Role for the required value.
- D.** Update the Role picklist on the Account-(?ontact Relationship object with new value.

Answer: ([SHOW ANSWER](#))

Explanation

To configure Financial Services Cloud to allow users to relate two business accounts, the administrator should update the Role picklist on the Account-Account Relationship object with new value. The Role picklist is a field on the Account-Account Relationship object that defines the type of relationship between two accounts, such as Household Member, Business Owner, Trustee, or Friend. The Role picklist is used to filter and display the account-account relationships in the Actionable Relationship Center (ARC). To update the Role picklist, you need to go to Setup > Object Manager > Account-Account Relationship > Fields & Relationships > Role and add or remove values according to your business needs. Verified References: : Salesforce Help Article

[10] : Salesforce Help Article [11]

NEW QUESTION: 16

A financial services company needs to alert advisors about changes in client records that require action. What should the administrator consider when configuring Record Alerts?

- A.** When the administrator adds a new Record Alert Category, the severity value in the alert category is the default value on the record alerts advisors create and cannot be changed.
- B.** Record alert categories are not required when creating a record alert, but they help keep alerts organized.
- C.** When the admin creates a value for the Severity field, the warning icon is associated with the field automatically, and advisors cannot change the icon.

D. With permissions for Record Alerts, users can create record alerts on all custom objects and standard objects such as Financial Account.

Answer: D (LEAVE A REPLY)

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NEW QUESTION: 17

Cumulus Insurance's business processes are quite complex, and steps in the process may vary depending on the information captured.

Which three actions regarding functionality and features should a consultant suggest exploring to help guide Cumulus Insurance users through these processes?

- A. Build custom Lightning pages that correspond to each stage of the business process.
- B. Configure Dynamic Actions for Lightning pages.
- C. Enable In-App Guidance to provide walk-throughs.
- D. Use flows to remove the need for complex Lightning pages.
- E. Configure Dynamic Lightning pages.

Answer: B,C,D (LEAVE A REPLY)

Explanation

The following actions regarding functionality and features should be suggested to help guide Cumulus Insurance users through their complex business processes:

Configure Dynamic Actions for Lightning pages. Dynamic Actions are a feature that allows you to customize the actions that appear on a Lightning page based on criteria such as record type, field value, device type, or user profile. You can use Dynamic Actions to show or hide actions that are relevant or irrelevant for each stage of the business process, such as creating a case, sending an email, or generating a quote.

Enable In-App Guidance to provide walk-throughs. In-App Guidance is a feature that allows you to create prompts and guided tours that appear within the Salesforce app to help users learn new features, complete tasks, or adopt best practices. You can use In-App Guidance to provide step-by-step guidance for complex business processes, such as onboarding a customer, submitting a claim, or renewing a policy.

Use flows to remove the need for complex Lightning pages. Flows are a tool that allows you to automate business processes and guide users or customers through screens that collect and display information.

Flows can have multiple steps and branching logic that ask for different information depending on the responses. You can use flows to simplify and streamline complex business processes, such as applying for a loan, enrolling in a plan, or changing a beneficiary. Verified References: : Salesforce Help Article [12] : Salesforce Help Article [13] : Salesforce Help Article [14]

NEW QUESTION: 18

A financial institution has custom security and visibility rules where certain users need to see specific records even though they are not typically engaged in that Account. This includes legal and compliance members who must be engaged for particular deals. Which Financial Services Cloud capability provides the ability to accommodate this request?

- A. Compliant Data Sharing
- B. Custom Sharing Rules
- C. Business Rules Engine
- D. Interaction Summaries

Answer: A ([LEAVE A REPLY](#))

Explanation

The Financial Services Cloud capability that provides the ability to accommodate the request of sharing specific records with certain users who are not typically engaged in that account is Compliant Data Sharing.

Compliant Data Sharing is a feature that allows users to share records with other users based on criteria such as record type or field value. Users can create sharing rules for objects such as account, contact, individual, financial account role, opportunity participant role, or case team role. By using Compliant Data Sharing, the financial institution can share records with legal and compliance members who must be engaged for particular deals based on a field value that indicates the deal type.

NEW QUESTION: 19

What is a key step in identifying different business processes and outlining encompassing system flows based on the existing environment when setting up Salesforce Financial Services Cloud (FSC)?

- A. Creating a new Salesforce instance from scratch for the customer
- B. Importing the customer's existing data into Salesforce FSC without any modifications
- C. Implementing a generic, one-size-fits-all solution for all customers
- D. Conducting a gap analysis between the customer's current processes and Salesforce FSC capabilities

Answer: ([SHOW ANSWER](#))

Explanation

A gap analysis is a key step in identifying different business processes and outlining encompassing system flows based on the existing environment when setting up Salesforce

Financial Services Cloud (FSC). A gap analysis is a method of comparing the current state of a system or process with the desired future state and identifying the gaps or differences between them. By conducting a gap analysis, a consultant can understand the customer's pain points, requirements, and expectations and design a solution that leverages the best practices and features of Salesforce FSC.

References:

Gap Analysis

Salesforce Financial Services Cloud Implementation Guide

NEW QUESTION: 20

A bank recently sold its wealth management division and wants to improve its customers' digital experience.

The bank engaged Salesforce Professional Services to upgrade its existing Salesforce CRM to Financial Services Cloud and deliver its Bank of the Future vision.

Which three expected outcomes can serve as return on investment (ROI) justifications to the bank's chief financial officer (CFO) and investment committee?

- A.** Unify and improve team collaboration by sharing and managing customer leads and referrals across multiple lines of business at the bank to drive customers' financial needs and deepen client relationships.
- B.** Deliver connected and personalized digital experiences to the bank's customers thanks to a 360-degree view of its customer data consolidating multiple customer databases and sources from diverse channels at the bank.
- C.** Simplify the client onboarding process with proper tools to streamline customer discovery and internal reviews through renewal.
- D.** Manage policy holder's interactions with customer service agents intelligently through the underwriting process.
- E.** Modernize client-advisor experiences from engagement to relationship management to effectively drive long-term, trusted relationships.

Answer: A,B,E (LEAVE A REPLY)

Explanation

Unify and improve team collaboration by sharing and managing customer leads and referrals across multiple lines of business at the bank to drive customers' financial needs and deepen client relationships; Deliver connected and personalized digital experiences to the bank's customers thanks to a 360-degree view of its customer data consolidating multiple customer databases and sources from diverse channels at the bank; Modernize client-advisor experiences from engagement to relationship management to effectively drive long-term, trusted relationships.

NEW QUESTION: 21

A financial services company has found that more than two-thirds of customer onboarding processes are manually done by client specialists, consuming large amounts of time and

resulting in errors in the sales process. The company contacts a consultant to learn how to leverage Financial Services Cloud features to improve the current state.

What should the consultant consider from a customer onboarding perspective?

- A.** If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies. Action Plan can be used to improve the current state.
- B.** If the company struggles with the low efficiency of tracking required documents for its customers and creating templates for checklists. Discovery Framework is recommended to improve the current state.
- C.** If the company struggles with the low efficiency of tracking required documents for its customers and creating templates for checklists, Action Plan is recommended to improve the current state.
- D.** If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies. Discovery Framework can be used to improve the current state.

Answer: A (LEAVE A REPLY)

Explanation

The consultant should consider the following from a customer onboarding perspective:

If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies, Action Plan can be used to improve the current state. Action Plan is a feature in Financial Services Cloud that allows you to automate and standardize common business processes or service requests, such as customer onboarding, account opening, or loan application. You can use Action Plan to create templates that define the tasks, owners, and deadlines for each process or request. You can also use Action Plan to create instances of templates that apply to specific target records, such as accounts, contacts, or opportunities. Action Plan can help you collect data in questionnaires and ensure compliance with company policies by providing step-by-step guidance and validation rules for each task. Verified References: : Salesforce Help Article [4] : Salesforce Help Article [5]

NEW QUESTION: 22

The Salesforce Admin of Lake Tahoe Wealth Management Company needs to update an existing, published Action Plan Template to accommodate a change in the firm's annual client review process. What steps should the Admin take to make that change?

- A.** Edit the published Action Plan Template directly.
- B.** Set the Action Plan Template to "Inactive" and then make changes to the template, as necessary.
- C.** Clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template.

Answer: C (LEAVE A REPLY)

Explanation

To update an existing, published Action Plan Template, the Admin should clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template. This is because published Action Plan Templates cannot be edited directly or set to inactive⁴. Cloning an Action Plan Template creates a copy of it with a new name and ID, which can then be modified and published⁴. Verified References: 4

NEW QUESTION: 23

Salesforce provides a robust set of automation features to help save time and resources. For example, a system administrator can use Flow Builder to automate most of an organization's repetitive business processes.

Which use case is a suitable fit for Flow Builder?

- A.** Coordinate multiple flows and assign them to multiple teams or individuals.
- B.** Suggest offers and actions to users that are tailored to meet an organization's unique business criteria.
- C.** Collect input from internal users with a form placed on a Lightning page cKlaunched by a button.
- D.** Perform an operation for more records than schedule-triggered flows allow

Answer: (SHOW ANSWER)

Explanation

A suitable use case for Flow Builder is to collect input from internal users with a form placed on a Lightning page or launched by a button. Flow Builder is a tool that allows users to automate business processes by building flows that guide users through screens, execute logic, manipulate data, and interact with Salesforce and external systems. By using Flow Builder, the system administrator can create a flow that collects input from internal users with a form and performs actions based on the input.

NEW QUESTION: 24

A financial services company offers special deposit products for its employees. These employees have customer records in Salesforce so that they can be serviced like normal customers. Only customer service employees within a specific group should be able to see these special deposit products in Salesforce to protect the personal financial information of bank employees.

How should the administrator configure sharing rules in Financial Services Cloud to meet these requirements?

- A.** Create an Account sharing rule based on record owner.
- B.** Create Account sharing rules based on criteria.
- C.** Create a Financial Account sharing rule based on record owner.
- D.** Create a Financial Account sharing rule based on criteri

Answer: D (LEAVE A REPLY)

Explanation

To meet the requirements of sharing special deposit products for employees, the administrator should create a Financial Account sharing rule based on criteria. A Financial Account sharing rule is a sharing rule that grants access to financial account records based on record owner or field values. A sharing rule based on criteria is a type of sharing rule that grants access to records that meet certain criteria. By creating a Financial Account sharing rule based on criteria, the administrator can share the special deposit products with the customer service employees within a specific group based on a field value that indicates the product type.

NEW QUESTION: 25

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.** 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.
- B.** Brokers should be modeled as Contact and the Broker company should be modeled as Account, even if they're a legal entity '-' individually.
- C.** 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.
- 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: (SHOW ANSWER)

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: 26

How can the Salesforce Admin change the configuration to summarize Financial Goals at the household level?

- A.** Add a custom Rollup By Lookup (RBL) rule.
- B.** Financial Goals can not be summarized at the household level.
- C.** Create a formula field and add it to the Account page layout
- D.** Update the selection in "Activities & Objects to Roll Up" to include Financial Goals

Answer: D (LEAVE A REPLY)

Explanation

To change the configuration to summarize Financial Goals at the household level, you need to update the selection in "Activities & Objects to Roll Up" to include Financial Goals. This option is available in Setup > Financial Services Settings > Activities & Objects to Roll Up. By selecting Financial Goals, you enable Group-Level Rollups for Financial Goals, which display the total number of goals, completed goals, and completion percentage of all the goals that belong to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 81.

NEW QUESTION: 27

Cumulus Bank wants to use Interactions to capture conversations that investment bankers have with their clients. Due to the sensitive nature of the interactions, the bank needs to carefully limit access to the detailed notes for certain groups. Basic information about attendees and meeting dates is not sensitive.

Which three options should a consultant recommend?

- A.** Enable Compliant Data Sharing for Interactions.
- B.** Enable Compliant Data Sharing for Interaction Summaries.
- C.** Disable Role-Hierarchy-Based Sharing for Engagement Interactions.
- D.** Use Interaction Summary Participants to provide the right access to individuals or groups.
- E.** Disable Role-Hierarchy-Based Sharing for Interaction Summaries.

Answer: B,D,E (LEAVE A REPLY)

Explanation

Enable Compliant Data Sharing for Interaction Summaries, Use Interaction Summary Participants to provide the right access to individuals or groups, and Disable Role-Hierarchy-Based Sharing for Interaction Summaries.

NEW QUESTION: 28

A consultant advising Cumulus Bank wants to ensure that the bank is compliant with Identity Verification Regulations when customers contact the bank.

Which two features should a consultant leverage to design this business process?

- A. Omni Studio
- B. Process Builder
- C. Discovery Framework
- D. Screen Flows

Answer: ([SHOW ANSWER](#))

Explanation

Process Builder and Screen Flows are two features that can be used to design a business process for identity verification. Process Builder is a tool that allows you to automate business processes by creating workflows that trigger actions based on certain criteria. Screen Flows are a type of flow that guide users through a series of screens to collect and update data. You can use Process Builder to launch a Screen Flow when a customer contacts the bank, and use the Screen Flow to capture and verify the customer's identity information.

References: [Process Automation], [Screen Flows]

NEW QUESTION: 29

Which three processes are part of Claims Management?

- A. Auto Adjudication
- B. Reserve Management
- C. Quoting
- D. Underwriting
- E. Payment

Answer: ([SHOW ANSWER](#))

Explanation

The following processes are part of Claims Management:

Auto Adjudication, which is a process that allows claims to be processed automatically without human intervention, based on predefined rules and criteria. Auto adjudication can improve the efficiency and accuracy of claims processing and reduce operational costs.

Reserve Management, which is a process that involves estimating and setting aside funds for future claims payments. Reserve management can help insurers manage their cash flow and solvency and comply with regulatory requirements.

Payment, which is a process that involves disbursing funds to claimants or providers after a claim has been approved. Payment can involve different methods, such as check, electronic funds transfer, or debit card. Payment can affect the customer satisfaction and retention rate of insurers.

NEW QUESTION: 30

Lake Tahoe Bank allows more than two owners on Financial Accounts. The Salesforce Admin wants to make sure that balances are rolled up to all joint owner's primary Households. Which 2 options does the Salesforce Admin have to accomplish this?

- A.** Enable all RBL (Rollup By Lookup) rules to ensure the balances are rolled up to the household level.
- B.** Enable the 'Enable Rollup Summary' in custom settings
- C.** Create custom RBL (Rollup By Lookup) rules to rollup the joint owner balances.
- D.** Disable RBL (Rollup By Lookup) rules that rollup balances using joint owner on Financial Account.
- E.** Enable RBL (Rollup By Lookup) rules that rollup balances using Financial Account Role for joint owners.

Answer: C,E (LEAVE A REPLY)

Explanation

Rollup By Lookup (RBL) is a feature in Financial Services Cloud that allows you to display summary calculations of financial account information, such as balances, market values, and cost bases. You can use RBL to roll up financial data to all joint owners' primary households by doing the following:

Create custom RBL rules to rollup the joint owner balances using the Joint Owner field on the Financial Account object.

Enable RBL rules that rollup balances using Financial Account Role for joint owners using the Account Role field on the Account Contact Relationship object. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 75.

NEW QUESTION: 31

The system administrator team at a retail consumer bank just received data migration instructions and guidance on Data Loader from their Salesforce architect to upgrade the existing Service Cloud org to a Financial Services Cloud (FSC) org.

In what order should the Salesforce objects be uploaded during an FSC data migration?

- A.** 1. Accounts and contacts
2. Financial accounts
3. Account groups and households
- B.** 1. Financial accounts
2. Accounts and contacts
3. Account groups
- C.** 1. Accounts and contacts
2. Households
3. Financial accounts
- D.** 1. Households
2. Financial accounts
3. Person accounts

Answer: A (LEAVE A REPLY)

Explanation

The order of uploading Salesforce objects during an FSC data migration is important to ensure data integrity and avoid errors. The recommended order is:

Accounts and contacts: These are the core objects that store the basic information about the customers and their relationships. They should be uploaded first to establish the foundation for the FSC data model⁴.

Financial accounts: These are the custom objects that store the financial information about the customers, such as balances, interest rates, fees, and transactions. They should be uploaded after the accounts and contacts, and linked to them using lookup fields⁵.

Account groups and households: These are the custom objects that group the accounts and contacts based on common attributes or relationships, such as family members or business partners. They should be uploaded after the financial accounts, and linked to them using junction objects⁶.

References:

Financial Services Cloud Data Model

Data Migration Best Practices

Accounts and Contacts

Financial Accounts

Account Groups and Households

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NEW QUESTION: 32

The Salesforce Administrator at Lake Tahoe Bank is asked to make modifications to the Salesforce org to allow for more than one person being joint owners on a Financial Account. What will be the recommended approach to model this requirement?

- A. Map the primary owner and one joint owner to the Financial Account, because FSC, supports only two joint account owners.
- B. Map additional owners using the Financial Account Role.
- C. Map additional owners using the Actionable Relationship Center.
- D. Create lookup fields on the Financial Account object to support additional owners

Answer: B (LEAVE A REPLY)

Explanation

To model a requirement where more than one person can be joint owners on a Financial Account, the Admin can map additional owners using the Financial Account Role. The Financial Account Role is a junction object that links a contact or an individual to a financial account and defines their role or relationship with that account. By using Financial Account Role, the Admin can add multiple owners to a Financial Account and specify their ownership percentage, primary status, and other details.

NEW QUESTION: 33

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a members Financial Account Balances are not adding up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

- A.** Ensure the Primary Group flag in the Account record is checked.
- B.** Ensure RollUpByLookup Configuration is Active
- C.** Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.
- D.** Ensure that the member is the Primary Member in that Household
- E.** Ensure the reported Household is the Primary Group for the member

Answer: (SHOW ANSWER)

Explanation

To troubleshoot the issue of Financial Account Balances not adding up to the Financial Summary field in the related Household, the Admin should take the following steps:
Ensure RollUpByLookup Configuration is Active, which is a custom setting that enables or disables the Rollup By Lookup (RBL) feature. RBL is a feature that allows users to aggregate data from financial accounts and display it at the client and group levels¹.
Ensure the reported Household is the Primary Group for the member, which is a field on the Account object that indicates whether an account is the primary group for a contact or an individual. The primary group determines which financial summary fields are displayed on the contact or individual page².

Verified References: 12

NEW QUESTION: 34

A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A.** Interest Tags
- B.** Alerts
- C.** Topics
- D.** Engagement Topics

Answer: A (LEAVE A REPLY)

Explanation

The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags. Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create

custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION: 35

Cumulus Bank has implemented Compliant Data Sharing in Financial Services Cloud. Which two things happen when an opportunity record that has opportunity participants with associated share table entries is set to Private?

- A.** The share table records are deleted.
- B.** Share table records need to be manually deleted.
- C.** All opportunity participant records are delete
- D.** The opportunity participant records are not deleted.

Answer: A,D (LEAVE A REPLY)

Explanation

The following things happen when an opportunity record that has opportunity participants with associated share table entries is set to Private:

The share table records are deleted, which means that any sharing access granted by the opportunity participants is revoked.

The opportunity participant records are not deleted, which means that they still exist on the opportunity record and can be viewed by users who have access to the opportunity.

NEW QUESTION: 36

What steps does the Salesforce Administrator 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 (LEAVE A REPLY)

Explanation

To create a new Business Milestone Type, you need to add a new picklist value on the Milestone Type field of the Business Milestone object. This field is used to categorize the different types of business milestones that can be tracked for a client. Verified

References: : Salesforce Financial Services Cloud Implementation Guide, page 57.

NEW QUESTION: 37

Lake Tahoe Bank is evaluating Financial Services Cloud to help them deliver a customer-centric view. They currently have a heavily customized Salesforce implementation with a product-centric design. Lake Tahoe Bank wants to make sure planned changes have a minimal impact on users during implementation. What is the recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank?

- A.** Implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org.
- B.** Implement Financial Service Cloud in a Trial org and convert the Trial org to production org.
- C.** Implement Financial Service Cloud in the existing org (Brown Field).
- D.** Implement Financial Service Cloud in the existing org's Sandbox and then deploy to production org to mitigate the end-user impact

Answer: A (LEAVE A REPLY)

Explanation

The recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank is to implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org. This approach allows Lake Tahoe Bank to leverage the best practices and features of Financial Services Cloud without being constrained by their existing customizations and data model. It also minimizes the impact on users during implementation, as they can continue to use their current system until the new org is ready to go live. A green field implementation requires careful planning, data migration, and change management, but it can result in a more efficient and customer-centric solution. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 8.

NEW QUESTION: 38

Which three of these statements are true for Rollup By Lookup (RBL) in Financial Services Cloud?

- A.** An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.
- B.** Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.
- C.** The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels
- D.** Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules
- E.** RBL rules do not require a lot of processing power.

Answer: A,C,D (LEAVE A REPLY)

Explanation

The following statements are true for Rollup By Lookup (RBL) in Financial Services Cloud: An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances. You can use RBL rules to aggregate financial account data across different levels of client relationships.

The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels. You can use RBL configuration to define which fields are rolled up and how they are calculated for each diem and group type.

Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules. RBL rules are complex and require extensive testing and validation. If you need to create or customize RBL rules, you should contact a certified Salesforce partner or consultant. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 75. : Salesforce Financial Services Cloud Implementation Guide, page 76. : Salesforce Financial Services Cloud Implementation Guide, page 77.

NEW QUESTION: 39

One administrator user at a financial services company needs to help management build reports and gain insights into business performance by including branch management reportable objects.

Which two considerations should the administrator include when configuring the report?

- A.** Branch Unit Related Record report types have related object names including Lead, Account, and Contact but exclude Financial Account.
- B.** Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records.
- C.** The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer.
- D.** When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects.

Answer: (SHOW ANSWER)

Explanation

The following considerations should be included when configuring the report with branch management reportable objects:

Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.

The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial Services Cloud. Banker is an object that represents a banker or an employee who works at a branch unit.

Branch Unit is an object that represents a physical location where bankers provide services to customers.

Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.

When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects

NEW QUESTION: 40

Which three objects should a Financial Services Cloud administrator use when planning to use the Mortgage Data Model to integrate with external Loan Origination and Customer Onboarding applications to accurately track the pipeline?

- A. Assets & Liabilities
- B. Opportunity
- C. Case
- D. Account
- E. Financial Account

Answer: B,D,E (LEAVE A REPLY)

Explanation

The following objects should be used when planning to use the Mortgage Data Model to integrate with external Loan Origination and Customer Onboarding applications to accurately track the pipeline:

Opportunity: An Opportunity is a standard object that represents a potential sale or deal for your products or services. You can use the Opportunity object to track and manage the stages, amounts, probabilities, and expected revenue of your deals. You can also use the Opportunity object to associate products, price books, quotes, contracts, orders, or assets with your deals.

Account: An Account is a standard object that represents a person or an organization that has a business relationship with your company. You can use the Account object to store information about your customers, such as name, address, phone number, website, industry, or rating. You can also use the Account object to associate contacts, opportunities, activities, cases, or notes with your customers.

Financial Account: A Financial Account is a custom object in Financial Services Cloud that represents a financial product or service that is owned by an account holder or related to an account holder's financial goal. You can use the Financial Account object to store information about your customers' financial accounts, such as type, balance, status, or interest rate. You can also use the Financial Account object to associate financial transactions, financial account roles, or financial goals with your customers' financial accounts. Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7] : Salesforce Help Article [8]

NEW QUESTION: 41

A major Japanese bank is expanding geographically and opening additional branches in Asia. As such, they hired a regional consulting firm to implement Financial Services Cloud (FSC) locally.

What are the two expectations from implementing multi language features in FSC?

A. Referrals in Singapore and Hong Kong will be shared in English, but in Macau, referrals will be shared in Portuguese.

B. Bankers in Japan have been accessing FSC in Japanese, but the new bankers in China will be accessing FSC in Chinese.

C. In Tokyo branches, the names of the Account, Prospect & Contact are in Japanese, but the package Advisor, Personal Banker, D Relationship Manager, and Client Associate profiles are in English.

D. In Seoul, South Korea, the branch managers will be reviewing their FSC dashboards every morning in Korean, while their colleagues in " Shanghai, China, will be doing so in Chinese.

Answer: B,D (LEAVE A REPLY)

Explanation

The following expectations are from implementing multi language features in FSC:

Bankers in Japan have been accessing FSC in Japanese, but the new bankers in China will be accessing FSC in Chinese. This expectation means that FSC supports multiple languages and allows users to choose their preferred language for their user interface and data display.

In Seoul, South Korea, the branch managers will be reviewing their FSC dashboards every morning in Korean, while their colleagues in Shanghai, China, will be doing so in Chinese.

This expectation means that FSC supports multiple languages for reports and dashboards and allows users to view them in their preferred language.

NEW QUESTION: 42

Which of the following objects do support Group-Level Rollups?

A. Tasks

B. Alerts

C. Financial Accounts

D. Action Plans

E. Opportunities

Answer: (SHOW ANSWER)

Explanation

The following objects do support Group-Level Rollups:

Financial Accounts: You can use Group-Level Rollups to display the total balance, total market value, and total cost basis of all the financial accounts that belong to a group.

Action Plans: You can use Group-Level Rollups to display the number of action plans, the number of completed action plans, and the completion percentage of all the action plans that are associated with a group.

Opportunities: You can use Group-Level Rollups to display the total amount, expected revenue, and weighted amount of all the opportunities that are related to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 80. : Salesforce Financial Services Cloud Implementation Guide, page 81. : Salesforce Financial Services Cloud Implementation Guide, page 82.

NEW QUESTION: 43

During a project's design phase, a consultant must provide a Financial Services Cloud solution that can support Compliant Data Sharing (CDS). What are three things the consultant should consider regarding CDS?

- A.** In a standard Salesforce org, Role Hierarchy for Account and Opportunity objects is enabled by default and can't be turned off.
- B.** A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories. Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?
- C.** Role Hierarchy-based sharing is disabled by default in CDS.
- D.** Participant Roles provide another way to grant data access without overwriting sharing behavior from existing sharing features.
- E.** Compliance managers and Salesforce administrators can enable CDS for Account and Opportunity objects.

Answer: (SHOW ANSWER)

NEW QUESTION: 44

An insurance company wants to create a car insurance quote process for its website. The process should include the following functionality:

- * The user has to enter contact and address information.
- * The user has to enter the driver's age and the car model and year.
- * The process should calculate an insurance quote based on the data the customer provided and save the offer to the client's record.

Which three OmniStudio tools should the consultant use to design a solution that meets these requirements?

- A.** OmniScripts
- B.** Integration Procedures
- C.** FlexCards
- D.** APEX Code
- E.** Business Rules Engine

Answer: A,B,E (LEAVE A REPLY)

Explanation

The following OmniStudio tools should be used to design a solution that meets the requirements for creating a car insurance quote process for the website:

OmniScripts, which are tools that allow users to create guided, interactive, and intuitive scripts that capture data and execute actions. By using OmniScripts, the consultant can create a script that guides the user through the car insurance quote process and captures the contact and address information, the driver's age, and the car model and year.

Integration Procedures, which are tools that allow users to orchestrate data and actions across multiple systems using RESTful APIs. By using Integration Procedures, the consultant can create a procedure that calls the core system service to calculate an insurance quote based on the data provided by the user and returns the quote to the OmniScript.

Business Rules Engine, which is a tool that allows users to define business logic and validation rules using natural language expressions. By using Business Rules Engine, the consultant can create rules that validate the data entered by the user and enforce any business policies or conditions for the car insurance quote process.

NEW QUESTION: 45

How can the Salesforce Admin help agents who deal with a large number of customers on a daily basis, quickly scan the Life Events component and find the information they need without much effort?

- A. The Admin can customize the order of life events to be set in chronological order.
- B. The user can change the color of important life events to red.
- C. The Admin can change the color of important life events to red.
- D. The user can customize the order of life events to be set in chronological order

Answer: (SHOW ANSWER)

Explanation

The Admin can change the color of important life events to red by using custom CSS in a Lightning App Builder theme layout component. This way, the agents can quickly scan the Life Events component and find the information they need without much effort. The color red can draw attention and indicate urgency or importance for certain life events.

NEW QUESTION: 46

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

Answer: (SHOW ANSWER)

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 References: : Salesforce Help Article 3 : Salesforce Help Article [4] : Salesforce Help Article [5]

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NEW QUESTION: 47

A financial services company is migrating a legacy customer relationship management system to Financial Services Cloud (FSC). The company is requesting that its consulting partner introduce specific customer interaction features mapped to its business processes. What should the consultant consider when introducing the FSC features?

- A.** If there is a business process for taking detailed notes for client meetings and adding action items, the Action Plan component is recommended to use.
- B.** If there is a business process for showing common interests and needs across the company's clients, the Interaction Summaries component is recommended to use.
- C.** If there is a business process for tracking the customer life events and milestones, and timely reminding of opportunities, the Action Plan component is recommended to use.
- D.** If there is a business process for limiting role-based data visibility, the Interaction Summaries component is recommended to use.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 48

A Salesforce administrator updating a record page to add a Chatter component to the Action Plan Lightning record page is unable to find the Chatter components for selection. What is the reason for this?

- A.** Feed tracking has to be enabled for the Action Plan object.
- B.** Chatter has to be enabled for Action Plans via Chatter settings in setup.
- C.** Salesforce is yet to roll out Chatter for the Action Plan object.
- D.** Admin users have to be assigned the Action Plans permission set.

Answer: A ([LEAVE A REPLY](#))

Explanation

Feed tracking has to be enabled for the Action Plan object in order to add a Chatter component to the Action Plan Lightning record page. Feed tracking allows you to see updates on records in Chatter feeds. You can enable feed tracking for custom objects, such as Action Plan, from the setup menu. Once feed tracking is enabled, you can add Chatter components, such as Feed or Publisher, to the record page using the Lightning App Builder. References: [Feed Tracking], [Chatter Components]

NEW QUESTION: 49

A Financial Services Cloud (FSC) administrator is setting up a permission set for Actionable Relationship Center. Which license should the administrator select on the Permission Set setup page?

- A.** FSC Standard
- B.** FSC Basic
- C.** OmniStudio
- D.** FSC Extension

Answer: ([SHOW ANSWER](#))

Explanation

To set up a permission set for Actionable Relationship Center (ARC), the administrator should select FSC Standard as the license on the Permission Set setup page. FSC Standard is a permission set license that enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects and features, including ARC1. By selecting FSC Standard as the license, the administrator can grant users access to ARC and its related objects and fields

NEW QUESTION: 50

A company wants to convert its Salesforce Financial Services Cloud implementation from using the individual account model to using person accounts.

Which three things should a consultant do to prepare for the conversion?

- A.** Ensure each account.phone field in the individual account record is blank.

- B.** Ensure each individual account to be converted is not a parent account of any other account records.
- C.** Update all opportunities linked to individual account records to be owned by the individual account record's owner.
- D.** Test out the conversion in a sandbox, including all integrations and customizations.
- E.** Ensure all individual account records to be converted are only linked to exactly one contact record.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 51

To access Financial Services Cloud Lightning Components "My Domain" must be enabled. How does the System Admin accomplish this?

- A.** Register a subdomain using the My Domain wizard and then deploy it
- B.** Open a case with Salesforce Support
- C.** Enable Communities
- D.** Go to Custom Settings and edit the Industries Settings

Answer: **A** ([LEAVE A REPLY](#))

Explanation

My Domain is a feature in Salesforce that allows you to create a subdomain for your org. You need to enable My Domain to access Financial Services Cloud Lightning Components, such as Actionable Relationship Center, Relationship Map, Life Events & Business Milestones, etc. To enable My Domain, you need to do the following:

Register a subdomain using the My Domain wizard in Setup > My Domain.

Deploy it to your users after testing it in your sandbox or developer org. Verified

References: :

Salesforce Help Article [7]

NEW QUESTION: 52

While working for an insurance client implementing Financial Services Cloud, an API integration between Salesforce and a risk control system has been configured. The consultant is asked to ensure the correct profiles and permissions were set up for this connection. Which two steps should the consultant take?

- A.** Update the System Administrator profile to include the API Only User.
- B.** Create a dedicated Integration User.
- C.** Assign the integration user to the System Administrator profile.
- D.** Create a new custom profile and ensure API Only is selected.

Answer: ([SHOW ANSWER](#))

Explanation

To ensure the correct profiles and permissions for an API integration between Salesforce and a risk control system, the consultant should do the following steps:

Create a dedicated Integration User that will be used to authenticate and authorize the API calls between Salesforce and the risk control system. The Integration User should have a unique username, password, and security token that are not shared with other users or systems. The Integration User should also have the minimum permissions and access settings required to perform the integration tasks.

Create a new custom profile and ensure API Only is selected. The API Only option restricts the user from logging in to the Salesforce user interface, but allows the user to access the Salesforce API. The custom profile should also have the appropriate object permissions, field-level security, record types, page layouts, and other settings that are relevant for the integration. The custom profile should be assigned to the Integration User.

NEW QUESTION: 53

To access all Financial Services Cloud (FSC) functionalities available out of the box, a consultant must install the FSC Managed Package and the Unmanaged Extension Packages.

Which two functionalities are included in the FSC Unmanaged Extension Packages?

- A. Predefined list views of clients and households
- B. The Commercial Banking dashboard
- C. Field sets that configure how fields display in the client and household profiles
- D. Custom objects to track Financial Accounts and Household

Answer: B,C (LEAVE A REPLY)

NEW QUESTION: 54

A financial services company wants to use the Financial Services Cloud Person Account data model. The company needs two Person Account record types, one to represent Individual customer and one to represent Individual independent advisors that send referrals.

What should the administrator do to set up the new record types?

- A. Create custom fields on the Person Account object.
- B. Configure Individual Record Type Mapper" custom metadata.
- C. Create a record type on the Contact object.
- D. Enable "Use Person Account" custom setting.

Answer: B (LEAVE A REPLY)

Explanation

To set up the new record types for Person Accounts, the administrator should configure Individual Record Type Mapper custom metadata. The Individual Record Type Mapper is a custom metadata type in Financial Services Cloud that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. The Individual Record Type Mapper maps Person Account record types to Individual record types, so that when a new Individual record is created from an email or calendar event, it automatically creates a corresponding Person Account record with the same record type.

To configure Individual Record Type Mapper custom metadata, you need to go to Setup > Custom Metadata Types > Individual Record Type Mapper > Manage Records and create a new record for each Person Account record type and its matching Individual record type. Verified References: : Salesforce Help Article [8] : Salesforce Help Article [9]

NEW QUESTION: 55

Lake Tahoe Bank, an existing Salesforce customer, is planning to implement Financial Services Cloud. Their Salesforce Admin is considering whether to use a new Salesforce org or upgrade the existing org. Which three of the considerations below indicate that a new Salesforce org is the better choice?

- A.** The bank wants to use this project as an opportunity to retire customization
- B.** The current implementation is using a product-centric view and the bank wants to move to a customer-centric view.
- C.** Data migration is a big concern. The current org has a large amount of data and the Bank wants to minimize data migration efforts.
- D.** The bank has limited redesign opportunities for business capabilities.
- E.** Existing business capabilities and processes can be redesigned to deliver a higher business impact

Answer: A,B,E (LEAVE A REPLY)

Explanation

The following considerations indicate that a new Salesforce org is the better choice for implementing Financial Services Cloud:

The bank wants to use this project as an opportunity to retire customization. A new org will allow the bank to start fresh and avoid carrying over unnecessary or outdated customization that may conflict with Financial Services Cloud features or best practices. The current implementation is using a product-centric view and the bank wants to move to a customer-centric view. A new org will allow the bank to adopt the Financial Services Cloud data model, which is designed to provide a holistic view of the customer and their relationships, goals, financial accounts, activities, and interactions.

Existing business capabilities and processes can be redesigned to deliver a higher business impact. A new org will allow the bank to leverage the Financial Services Cloud capabilities, such as Action Plans, Relationship Groups, Rollup By Lookup, Service Processes, etc., to optimize their business processes and enhance their customer experience. Verified References: : Salesforce Help Article 6

NEW QUESTION: 56

The Salesforce Admin at Lake Tahoe Wealth Management Company wants to ensure that the advisors at his firm can quickly see the most important client data in the Actionable Relationship Center (ARC). What must the Admin configure for each object to display the most important fields on the side panel of ARC?

- A.** Compact Layout

- B. Page Layout
- C. Search Layout
- D. Lightning Record Pages
- E. Field Sets

Answer: A ([LEAVE A REPLY](#))

Explanation

To display the most important fields on the side panel of ARC, the Admin must configure the Compact Layout for each object. The Compact Layout is a layout that determines which fields appear in key places in Salesforce such as record highlights areas, list views, lookup dialogs, and global search results. The Admin can use the Compact Layout to select up to 10 fields that are most relevant for each object and display them on the side panel of ARC

NEW QUESTION: 57

Lake Tahoe Bank wants to onboard a client digitally and without asking the client for information that the bank already has on file. The process has multiple steps and can have branching (conditional) logic that asks for different information depending on the responses. Which Salesforce feature should be used for this digital onboarding process?

- A. Action Plans
- B. Financial Goals
- C. Actionable Relationship Center
- D. Flows

Answer: D ([LEAVE A REPLY](#))

Explanation

The Salesforce feature that should be used for the digital onboarding process is Flows. Flows are a tool that can automate business processes and guide users or customers through screens that collect and display information. Flows can have multiple steps and branching logic that ask for different information depending on the responses. Flows can also integrate with existing data and prefill fields with information that the bank already has on file, reducing the need to ask the customer for redundant information. Flows can be embedded in Lightning pages, Experience Cloud sites, mobile apps, or websites to provide a seamless and engaging digital onboarding experience. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION: 58

An investment banker is looking to take detailed meeting notes and share them easily with his colleagues while specifying confidentiality and meeting attendees. Which Financial Services Cloud feature should a consultant recommend in this scenario?

- A. Notes
- B. Events
- C. Engagement Interaction

D. Interaction Summary

Answer: D (LEAVE A REPLY)

Explanation

Interaction Summary is the Financial Services Cloud feature that should be recommended in this scenario.

Interaction Summary is a standard object that represents a summary of an interaction with a client or a group of clients. It allows the user to capture meeting notes, specify confidentiality level, link related records, and associate interaction participants. Interaction Summary can be created from the Interaction Summary component on a record page or from the New Interaction Summary action on a list view or related list.

References: [Interaction Summary Object], [Create an Interaction Summary]

NEW QUESTION: 59

Which three types of preassembled flows can be utilized from the Financial Services Cloud (FSC) packages and the Lightning Flow for FSC package?

- A. Institutional Banking flow
- B. Mortgage flow
- C. Insurance flow
- D. Retail Banking flows
- E. Commercial Banking flow

Answer: B,C,D (LEAVE A REPLY)

Explanation

The Financial Services Cloud (FSC) packages and the Lightning Flow for FSC package provide preassembled flows that can be utilized to automate common financial services processes. The types of preassembled flows are:

Retail Banking flows: These flows enable retail banking customers to perform various self-service tasks, such as activating or closing a card, ordering checks, updating communication preferences, disputing transactions, and more¹.

Insurance flow: This flow allows insurance customers to initiate the first notification of loss (FNOL) for an insurance policy².

Mortgage flow: This flow helps mortgage customers to capture their financial information, such as assets, liabilities, income, and expenses, as part of the financial discovery process³.

References:

Financial Services Cloud Flows

Lightning Flow for Financial Services

Retail Banking Flows

Insurance Flow

Mortgage Flow

NEW QUESTION: 60

A consultant is looking to create a guided screen to be used by customer service agents answering the phone to authenticate the caller and positively identify them. The agent will ask the caller to provide their full name and the last four digits of their social security number, which is not stored in Salesforce. The agent will enter the provided information into a form, and upon clicking submit, a web service call is made to an external authentication service to authenticate the caller.

What should the consultant do to fulfill the needed requirements?

- A. Create a screen flow.
- B. Create a Lightning web component.
- C. Create a Canvas application for the Authentication module.
- D. Create an OmniScript flow.

Answer: A (LEAVE A REPLY)

Explanation

A screen flow is a type of flow that guides users through a series of screens to complete a task or collect information². Screen flows can also interact with external systems using Apex actions or invocable actions³.

In this case, the consultant can create a screen flow that collects the caller's name and social security number from the agent, and then invokes an Apex action or an invocable action that makes a web service call to an external authentication service.

NEW QUESTION: 61

Lake Tahoe Bank has been using Sales Cloud to support the business to consumer (B2C) activities. The VP of IT wants a better and more flexible data model that can support his B2C Banking use cases. He is considering upgrading to Financial Services Cloud, using Person Accounts. Which 2 of these statements are true for the Financial Services Cloud Person Account Data Model?

- A. Person Accounts can be merged with Business Accounts in Financial Services Cloud
- B. To share a Person Account record the admin will need to create sharing rules Account and Contact objects
- C. The Person Account record type can be used when a client is an agent for a broker firm that is doing business with the Financial Institution.
- D. The Person Account is a virtual object displaying data from Accounts and Contacts objects. It represents all aspects of the person and includes D data such date of birth or tax ID number.
- E. The Person Account model uses the standard Account object to hold all of the details about a person The Account object has been extended " with custom fields and a Person Account Record Type

Answer: D,E (LEAVE A REPLY)

Explanation

The following statements are true for the Financial Services Cloud Person Account Data Model:

The Person Account is a virtual object displaying data from Accounts and Contacts objects. It represents all aspects of the person and includes data such as date of birth or tax ID number. You can use Person Accounts to store information about individual people by combining certain Account and Contact fields into a single record.

The Person Account model uses the standard Account object to hold all of the details about a person.

The Account object has been extended with custom fields and a Person Account Record Type. You can use Person Accounts to simplify your data model and reduce the number of records you need to manage.

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NEW QUESTION: 62

Users at Lake Bank have been creating multiple events for once in a lifetime event such as birth. What should an Administrator do to prevent users from accidentally creating more than one event of such an event type?

- A. Create an Apex trigger that will prevent the saving of multiple one-time events
- B. Select the Unique checkbox on the picklist value for the Event Type field on the Person Life Event object
- C. Remove user's ability to create one-time events
- D. Create a validation rule that will stop the user if they attempt to add multiple one-time events.

Answer: D (LEAVE A REPLY)

Explanation

To prevent users from accidentally creating more than one event of such an event type, the Admin should create a validation rule that will stop the user if they attempt to add multiple one-time events. A validation rule is a rule that verifies that the data a user enters in a record meets the standards you specify before the user can save the record. By creating a validation rule, the Admin can ensure that only one event of a certain type can be created for each contact.

NEW QUESTION: 63

What feature does a Salesforce Administrator need to enable so users can see all the referrals for the members of a group?

- A. Referral Scoring
- B. Referrals Rollups
- C. Group Member Referrals
- D. Referral Group Process Builder

Answer: (SHOW ANSWER)

Explanation

Referrals Rollups is a feature that enables users to see all the referrals for the members of a group, such as a branch or a team. It also allows users to filter referrals by status, priority, or owner.

NEW QUESTION: 64

It has been determined that integration with an external system is required, as the data needed by a wealth management client resides in another system. This data will be sent from the external system via an API, and Salesforce needs to be configured in preparation for the data.

Which two items should be configured?

- A. Objects and fields to store the data
- B. A flow to get the data into Salesforce
- C. A Lightning web component to restrict data from users
- D. An integration User and Integration Profile to enable the connection

Answer: A,D (LEAVE A REPLY)

Explanation

To integrate with an external system, Salesforce needs to have objects and fields that can store the data that will be sent from the external system via an API. These objects and fields should match the data structure and format of the external system as much as possible. Additionally, Salesforce needs to have an integration user and an integration profile that can enable the connection between Salesforce and the external system. The integration user is a dedicated user account that has access to the API and can perform data operations on behalf of other users. The integration profile is a custom profile that defines the permissions and settings for the integration user.

NEW QUESTION: 65

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the client onboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.
- B. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.
- C. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.

D. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.

Answer: A,B (LEAVE A REPLY)

Explanation

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority4.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION: 66

A consultant is configuring a demo for a customer but cannot create new residential loan application records.

What is prohibiting the consultant from creating a new residential loan application?

- A. The Residential Loan Application flow was not enabled in the setup.
- B. The administrator did not enable "Allow Mortgage Access" in Setup.
- C. The user does not have "Mortgage User" checked in their user record.
- D. The administrator did not assign the Mortgage permission set to the user.

Answer: (SHOW ANSWER)

Explanation

The administrator did not assign the Mortgage permission set to the user. The Mortgage permission set is required to access the Residential Loan Application object and its related objects, such as Loan Application Form, Loan Assessment, and Loan Product. Without this permission set, the user cannot create, edit, or view residential loan application records.

The administrator can assign the Mortgage permission set to the user from the user detail page in Setup. References: [Mortgage Permission Set], [Residential Loan Application Object]

NEW QUESTION: 67

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

Answer: B,D (LEAVE A REPLY)

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: 68

What benefits do Flows for Financial Services Cloud offer to support customer onboarding? (Choose Two)

- A.** Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- B.** Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to * navigate to different screens.
- C.** Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.
- D.** Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling
- E.** Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.

Answer: B,E (LEAVE A REPLY)

Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to navigate to different screens. Flows can simplify and streamline the customer onboarding process by automating tasks and collecting information in an easy and intuitive way. You can use Flows to create service requests that capture the customer's details and update the related records in one place. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.

Flows can integrate with Experience Cloud sites, mobile apps, or websites to provide self-service options for customers. You can use Flows to create appointment scheduling forms that allow customers to book appointments with the right specialist at the right time and place. Verified References: :

Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION: 69

In Financial Services Cloud, what is the criteria for commas and symbols to be displayed correctly on the Financial Account Summary component?

- A. User currency must match org default currency.
- B. Account currency must match org default currency.
- C. User's locale must match user's currency.
- D. User's locale and language must match user's currency.

Answer: C (LEAVE A REPLY)

Explanation

The criteria for commas and symbols to be displayed correctly on the Financial Account Summary component is that user's locale must match user's currency. The locale is a setting that determines how dates, times, numbers, and currencies are formatted and displayed for a user. The currency is a setting that determines how monetary amounts are formatted and displayed for a user. By matching the user's locale with their currency, FSC can ensure that commas and symbols are displayed correctly on the Financial Account Summary component according to the user's preferences and expectations

NEW QUESTION: 70

A retail bank is using Financial Services Cloud to support its operations. The bank has received complaints that its clients' documentation is often submitted late and when clients call, customer service agents are struggling with multiple systems to determine where the documentation is.

Which solution should a consultant suggest the client explore?

- A. A Marketing Cloud integration to manage client communications
- B. An APEX solution to leverage the SendMail capabilities of Salesforce
- C. Process Builder to create automatic document requests for missing items
- D. The Send Documents flow for Retail Banking

Answer: D (LEAVE A REPLY)

Explanation

The solution that the consultant should suggest the client explore to improve its clients' documentation submission and tracking is the Send Documents flow for Retail Banking. The Send Documents flow for Retail Banking is a prebuilt flow that allows users to send documents requests to clients via email and track the status of the requests in FSC. The flow uses DocuSign eSignature integration to enable clients to sign and return documents electronically. By using the Send Documents flow for Retail Banking, the consultant can help the client streamline and simplify its document management process and improve its customer service agents' efficiency

NEW QUESTION: 71

A Salesforce Admin is configuring a new Action Plan Template. One task in that template needs to be picked up by the next available Advisor. What assignment logic should the Admin use when configuring this template task?

- A. Action Plan Creator
- B. Specific User
- C. Account Team
- D. Role
- E. Queues

Answer: E ([LEAVE A REPLY](#))

Explanation

To assign a task to the next available Advisor, the Admin should use Queues as the assignment logic when configuring the template task. Queues are collections of records that can be assigned to multiple users who share workloads and responsibilities. By using Queues, the Admin can ensure that any Advisor who is part of the Queue can pick up the task when they are available.

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