



**Free Questions for [Financial-Services-Cloud](#) by [dumpshq](#)**

**Shared by [Robertson](#) on [09-08-2024](#)**

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## Question 1

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**Question Type:** MultipleChoice

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Mortgage Broker Sue Berry wants to give an incentive reward to her top internal referrers.

What is the best practice for Sue Berry to identify her top referrers quickly?

### Options:

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- A) Log referrers in Salesforce using the Lead object and create a "My top Referrers" report.
- B) Log each referral as an activity and create a dashboard.
- C) Use the Referral Performance by User dashboard to get the data.
- D) Use Action Plans to create Referral Records.

### Answer:

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A, B, D

## Question 2

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**Question Type:** MultipleChoice

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What capabilities included in the FSC license can assist bankers in focusing on the most promising referrals?

**Options:**

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- A) Einstein Referral Scoring for FSC
- B) Referral Routing Rules
- C) Intelligent Need-Based Referrals and Scoring
- D) Referral Approval Processes

**Answer:**

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C

## Question 3

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**Question Type: MultipleChoice**

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Which three standard fields are available to track a customer's retirement goal process?

**Options:**

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- A) Target Value
- B) Actual Value
- C) Total Value
- D) Target Date
- E) Contributions

**Answer:**

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A, B, D

## Question 4

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**Question Type: MultipleChoice**

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What are three examples of proper use of Financial Goals?

**Options:**

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- A) Measure progress toward paying off a Mortgage.
- B) Tracking money saved each year to pay for a vacation, depending on destination and budget.
- C) Displaying the current amount and percentage of target value for a College Savings Account.
- D) Displaying the amount and percentage of the remaining balance for an Auto Loan.
- E) Measure progress toward a down payment amount for a new home.

**Answer:**

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B, C, E

## Question 5

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**Question Type:** MultipleChoice

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What is included in a FSC license?

**Options:**

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- A) Lightning Scheduler
- B) Action Plans

C) Einstein Analytics for Financial Services

D) FSC for Community

**Answer:**

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B

## Question 6

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**Question Type: MultipleChoice**

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Does FSC require Lightning?

**Options:**

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A) Yes

B) No

**Answer:**

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A

## Question 7

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**Question Type:** MultipleChoice

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Which of the following is NOT an area that Salesforce Financial Services Cloud serves?

**Options:**

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- A) Asset Management
- B) Corporate & Institutional Banking
- C) Legal Services
- D) Lending Services

**Answer:**

---

C

## Question 8

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**Question Type:** MultipleChoice

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What are the challenges Financial Institutions face? (Select all that apply)

**Options:**

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- A) Regulatory compliance
- B) Rising class of new competitors
- C) Not enough data
- D) Isolated data and outdated systems

**Answer:**

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A, B, C

## Question 9

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**Question Type: MultipleChoice**

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Which of the following statement is true of Financial Services Cloud?



**Options:**

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- A) You need to assign only the Financial Services Cloud license before you can access the product features
- B) Financial Services Cloud sits on top of Sales and Service Cloud
- C) Financial Services Cloud is an app you buy from AppExchange
- D) Financial Services Cloud is for only Wealth Management companies

**Answer:**

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B

## Question 10

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**Question Type: MultipleChoice**

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A banking customer is using Sales Cloud but their Admin is considering whether Financial Services Cloud would be a better solution to meet their business needs.

What is the best way for the Admin to access a Financial Services org with preconfigured data to play around and learn what's in it?

**Options:**

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- A) Hop on a 30-day Financial Services Cloud trial org
- B) Request a Salesforce developer org
- C) Purchase one license of an FSC production org
- D) Spin up a Trailhead challenge org

**Answer:**

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A

## Question 11

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**Question Type:** MultipleChoice

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You are getting started with a Financial Services Cloud org. What's a reason why

you cannot see the Lightning components and any pre-configured sample data after you set up 'My Domain'?

**Options:**

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- A) Contact Salesforce to enable 'My Domain'

- B) Confirm that you click 'Deploy to Users' to permanently deploy the custom domain to users
- C) You need to switch to Salesforce Classic
- D) It is working as designed. You need to configure Financial Services Cloud to create new Lightning components and sample data.

**Answer:**

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B

## Question 12

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**Question Type:** MultipleChoice

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Which Financial Services object would you use to store Bank Accounts data?

**Options:**

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- A) Charges and Fees
- B) Assets and Liabilities
- C) Financial Account
- D) Financial Holding

**Answer:**

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C

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