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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q35-Q40):

NEW QUESTION # 35

An investment bank is implementing Financial Services Cloud (FSC) to manage the deal pipeline. Each opportunity has confidential information that the deal team members must only view. In addition, each member needs the ability to take and share notes directly within Salesforce with others on the team.

Which three FSC features should be part of the solution design?

- A. Profiles
- **B. Interaction Summaries**
- **C. Sharing Rules**
- **D. Financial Deal Management**
- E. Compliance Sharing

**Answer: B,C,D**

Explanation:

The following FSC features should be part of the solution design for managing confidential deal information and notes sharing among deal team members:

**Financial Deal Management:** Financial Deal Management is a feature in Financial Services Cloud that allows you to track and manage complex deals that involve multiple parties, products, and stages. You can use Financial Deal Management to store confidential deal information such as deal name, amount, status, or participants. You can also use Financial Deal Management to associate opportunities, products, or tasks with a deal.

#### NEW QUESTION # 36

Lake Tahoe Bank has duplicate client records in their current CRM system because they come from a different systems of record. Any changes made in Salesforce should be updated in the source system. What can a Salesforce Administrator do to help bankers get a consolidated view of the individual in the Financial Services Cloud?

- A. Create custom components to provide a single view of the client.
- **B. Leverage Financial Services Cloud Relationship Groups to link duplicate client records and create a consolidated view.**
- C. Create a custom Person Account hierarchy to link duplicate client records.
- D. Link individuals using related contacts to link duplicate client records
- E. Implement deduplication rules in Salesforce and let the integration handle the updates to the source system.

**Answer: B**

Explanation:

A 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 Relationship Groups to link duplicate client records and create a consolidated view of their financial data, activities, and interactions. You can also use Relationship Groups to sync data between Salesforce and the source system using external IDs and integration tools. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 67.

#### NEW QUESTION # 37

If a client is associated with more than one Household or Group, where will this client's records get rolled up to?

- **A. to the household selected by the advisor for record rollups.**
- B. to the Household where the client is the primary member
- C. to the household with the client's primary address
- D. to all the parent households and groups

**Answer: A**

Explanation:

If a client is associated with more than one Household or Group, their records will get rolled up to the household selected by the advisor for record rollups. A Household or Group is a construct in Financial Services Cloud that allows you to group related accounts together and view their aggregated financial data and activities. A client can belong to multiple Households or Groups, but only one of them can be selected as their primary Group for record rollups. The primary Group determines which Household or Group will display the client's records in its summary components or related lists. The advisor can select or change the primary Group for a client using the Primary Group field on the client's record page. Verified References: : Salesforce Help Article 6

### NEW QUESTION # 38

What are two language-related limitations of Financial Services Cloud?

- A. Flows are available only in English.
- **B. Predefined reciprocal roles are available only in English.**
- **C. Referral record type labels are supported only in English.**
- D. Custom component labels are supported only in English.

**Answer: B,C**

Explanation:

Predefined reciprocal roles are available only in English and Referral record type labels are supported only in English are two language-related limitations of Financial Services Cloud. Predefined reciprocal roles are the roles that define the relationship between two individual clients or between an individual client and a group.

For example, Spouse, Child, Parent, etc. These roles are not translated into other languages and cannot be edited or deleted.

Referral record type labels are the labels that indicate the type of referral, such as Client Referral or Prospect Referral. These labels are also not translated into other languages and cannot be edited or deleted. References: [Predefined Reciprocal Roles], [Referral Record Type Labels]

### NEW QUESTION # 39

Permission set licenses incrementally entitle users to access features that are not included in their user licenses.

Which three Permission Set Licenses give users access to Financial Services Cloud features?

- A. Lightning Scheduler Resource
- **B. Financial Services Cloud Standard**
- **C. FSC Insurance**
- D. Mortgage
- **E. Action Plans**

**Answer: B,C,E**

Explanation:

The following Permission Set Licenses give users access to Financial Services Cloud features:

**Financial Services Cloud Standard:** This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL)<sup>1</sup>.

**Action Plans:** This license enables user access to the Action Plans feature, which allows users to create templates for common client processes, such as loan approval, account opening, or financial review. Action Plans can create repeatable tasks and automate the task sequences when executed<sup>2</sup>.

**FSC Insurance:** This license enables user access to the Insurance feature, which allows users to manage insurance policies and claims for clients. This license also provides access to some Insurance objects such as Policy, Claim, Coverage Type, Policy Product, Policy Product Offering. Verified References: <sup>12</sup>

### NEW QUESTION # 40

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