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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q122-Q127):

NEW QUESTION # 122

Lake Tahoe Bank branch manager Sue Barry wants to encourage all Personal Bankers to use Action Plans to capture repeatable tasks and automate the task sequences, improving collaboration and productivity. Which three of the following statements about Action Plans are true?

- A. Action Plans can be used to automatically assign task owners and deadlines for specific client engagements

- B. Action Plans can be used to schedule appointments with the Bankers
- C. Action Plans make it easy to create reports and dashboards, so you can monitor progress and ensure compliance
- D. When you work with Action Plans, you first create Action Plan Templates
- E. Action Plans require a monthly license fee per user

Answer: A,C,D

Explanation:

The following statements about Action Plans are true:

When you work with Action Plans, you first create Action Plan Templates, which are reusable sets of tasks that define a common client process.

Action Plans make it easy to create reports and dashboards, so you can monitor progress and ensure compliance. Users can use standard report types or custom report types to create reports on action plans, action plan templates, action plan items, action plan item templates, and action plan item owners.

Action Plans can be used to automatically assign task owners and deadlines for specific client engagements. Users can specify task owners by using assignment logic such as specific user, role, queue, action plan creator, or account team. Verified References: 1

NEW QUESTION # 123

Which setting can a system administrator enable in the user interface? (2 answers)

- A. Printable list views
- B. Customizable recent tags
- C. Chatter messenger for specific users
- D. Related list hover links

Answer: A,D

NEW QUESTION # 124

Lake Tahoe Bank would like to capture their commercial customers in FSC. A commercial customer can be owned by multiple groups. How can Lake Tahoe Bank SF Admin configure FSC to capture and display commercial customer and its parent company? (3 correct answers)

- A. Leverage Groups to capture the majority owner and Account hierarchy to capture minority owner
- B. Capture the majority owner as parent account using Account hierarchy
- C. Link multiple owners to the business entity as a Group
- D. Enable Relationship Group Hierarchy in Custom Metadata
- E. Add the Business record type to the Group record type mapper

Answer: A,C,D

NEW QUESTION # 125

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. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component
- C. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
- D. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field

Answer: D

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 # 126

Lake Tahoe Bank would like to restrict their Financial Services Cloud users from viewing certain types of milestones that might be irrelevant to their customers or might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

- **A. The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane.**
- B. The Salesforce Admin can hide the life Event or Business Milestone type, by removing it from the Event Type picklist.
- C. The Salesforce Admin can manage sensitive Life Events using Permission Sets.
- D. The Salesforce Admin can manage sensitive Life Events using sharing rules.

Answer: A

NEW QUESTION # 127

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