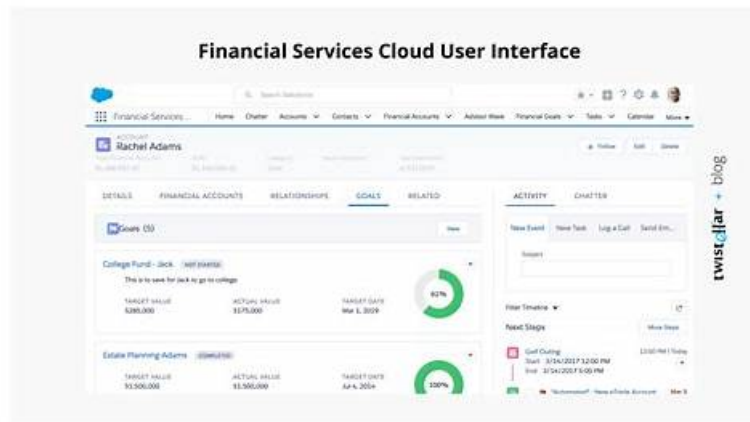


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Questions (Q79-Q84):

NEW QUESTION # 79

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

Answer: A,B

Explanation:

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 # 80

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

- A. RBL rules do not require a lot of processing power.
- 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. An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.

Answer: C,D,E

NEW QUESTION # 81

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

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

Answer: B,C,E

NEW QUESTION # 82

A Financial Services Cloud (FSC) administrator is assigning permission set licenses to users, including personal bankers. Which permission set license is recommended for this set of users?

- A. FSC Basic permission set license
- B. FSC Foundations permission set license
- **C. FSC Standard permission set license**
- D. FSC Extension permission set license

Answer: C

NEW QUESTION # 83

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

Answer: C,D,E

Explanation:
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)1.

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 executed2.

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: 12

NEW QUESTION # 84

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