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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q102-Q107):

NEW QUESTION # 102

Which 3 out of the box capabilities come with Financial Services Cloud Lead & Referral Management?

- A. Accepting a Referral
- B. Referral Automated Approvals
- C. Assigning a Referral
- D. Referral Conversion

- E. Round Robin Referral Routing

Answer: A,C,D

Explanation:

The following out of the box capabilities come with Financial Services Cloud Lead & Referral Management:

Referral Conversion: This capability allows you to convert a referral to an opportunity, a contact, or an account. You can use this capability to track the progress and outcome of a referral and measure its impact on your business.

Assigning a Referral: This capability allows you to assign a referral to another user, queue, or line of business.

You can use this capability to route a referral to the appropriate person or team who can best meet the customer's need or interest.

Accepting a Referral: This capability allows you to accept a referral that is assigned to you or your queue.

You can use this capability to acknowledge that you have received a referral and are ready to work on it.

Verified References: : Salesforce Help Article 1 : Salesforce Help Article 3 : Salesforce Help Article 5

NEW QUESTION # 103

When importing records from a system outside of Salesforce, which ID should be used to prevent the data import from creating duplicates?

- A. User ID
- B. Data Load ID
- **C. External ID**
- D. Org ID

Answer: C

Explanation:

To prevent the data import from creating duplicates when importing records from a system outside of Salesforce, you should use External ID. External ID is a custom field type that can be used to store unique identifiers from other systems. You can use External ID to match records during data import and avoid creating duplicate records in Salesforce. You can also use External ID to enable upsert operations, which can insert new records or update existing records based on the External ID value. Verified References: : Salesforce Help Article [5] : Salesforce Help Article [6]

NEW QUESTION # 104

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

Answer: C

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 # 105

Cumulus Insurance has created a Delegated Administrator group for its franchise users to reduce the workload on head office support staff.

Which three functions should be added to the Delegated Administrator group?

- A. Create and manage membership of specified public groups.
- B. Set organization-wide sharing defaults on custom objects.
- C. Modify permission sets.
- D. Assign or remove permission sets for users in their delegated groups.
- E. Unlock users.

Answer: A,D,E

Explanation:

The following functions should be added to the Delegated Administrator group for its franchise users:

Unlock users, which is a function that allows delegated administrators to unlock users who have been locked out due to incorrect login attempts or password expiration.

Assign or remove permission sets for users in their delegated groups, which is a function that allows delegated administrators to grant or revoke additional permissions for users in their delegated groups by using permission sets.

Create and manage membership of specified public groups, which is a function that allows delegated administrators to create public groups for sharing purposes and add or remove users from those groups.

NEW QUESTION # 106

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

Answer: C

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 # 107

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