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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q121-Q126):

NEW QUESTION # 121

Cumulus Bank is migrating its CRM software from a legacy application to Salesforce Financial Services Cloud (FSC). The bank hired Salesforce Professional Services to configure/deploy the new Salesforce FSC org and migrate data. Which order should a consultant follow when performing the data migrations?

- A. Financial Accounts, then Financial Account Transactions, then Financial Account Roles, then Individuals
- B. Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions
- C. Individuals, then Financial Account Roles, then Financial Accounts, then Financial Account Transactions
- D. Financial Accounts, then Financial Account Roles, then Individuals, then Financial Account Transactions

Answer: B

Explanation:

The order that the consultant should follow when performing the data migrations is Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions. This order ensures that the data dependencies and relationships are maintained and that the data integrity and quality are preserved. By migrating Individuals first, the consultant can create the records that represent the customers of the bank. By migrating Financial Accounts next, the consultant can create the records that represent the financial products or services that the customers own or use. By migrating Financial Account Roles next, the consultant can create the records that link the individuals to the financial accounts and define their roles or relationships with those accounts. By migrating Financial Account Transactions last, the consultant can create the records that represent the transactions or activities that occur on the financial accounts.

NEW QUESTION # 122

A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A. Engagement Topics
- B. Alerts
- C. Interest Tags
- D. Topics

Answer: C

Explanation:

The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags. Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION # 123

During the delivery stage of a Financial Services Cloud (FSC) implementation, a consultant needs to think about how to utilize FSC-related objects. Which three things should the consultant consider when adopting such objects?

- A. In a household, each of the household members is modeled as a Person Account and the household is modeled as an Account.
- B. Interaction Summary is an enhancement of the standard Activity object. FSC implementations should use Interaction Summary as a replacement for the Activity object.
- C. In a household, each household member is modeled as a Contact, and the household is modeled as an Account.
- D. Role Hierarchy-based sharing can be disabled for the Financial Deal object but can't be disabled for the Opportunity object.
- E. Both the Financial Deal object and the Opportunity object support Compliant Data Sharing.

Answer: C,D,E

Explanation:

Reference: Set Up Clients, Households, and Relationships, Compliant Data Sharing in Financial Services Cloud | Salesforce Trailhead, Track Client Interactions - Salesforce Explanation: Some considerations when adopting FSC-related objects are: In a household, each household member is modeled as a Contact, and the household is modeled as an Account. A household is a type of relationship group that represents a group of clients who have a direct relationship with one another and shared financials, such as spouses and their dependent children. A household is modeled as an Account record with a custom record type of Household. Each household member is modeled as a Contact record that is related to the household Account. A household can also have related accounts and contacts that are not part of the household, but are associated with it for some reason.

Both the Financial Deal object and the Opportunity object support Compliant Data Sharing. Compliant Data Sharing (CDS) is a feature of FSC that allows granular control over access to sensitive data in Account and Opportunity objects. CDS can help

financial services companies comply with regulations and policies that restrict data visibility based on user roles. CDS can also be enabled for the Financial Deal object, which is a custom object that represents a business opportunity or transaction with a client. The Financial Deal object can be used instead of or in addition to the Opportunity object, depending on the business needs. Interaction Summary is an enhancement of the standard Activity object. FSC implementations should use Interaction Summary as a replacement for the Activity object. Interaction Summary is a custom object that captures the details of a client interaction, such as a meeting, a call, or an email. Interaction Summary can be linked to other FSC objects, such as Financial Accounts, Financial Goals, Financial Deals, or Relationship Groups. Interaction Summary can also have participants, which are records that represent the people or groups involved in the interaction.

NEW QUESTION # 124

A consultant advising Cumulus Bank wants to ensure that the bank is compliant with Identity Verification Regulations when customers contact the bank.

Which two features should a consultant leverage to design this business process?

- A. Omni Studio
- B. Screen Flows
- C. Discovery Framework
- D. Process Builder

Answer: B,D

Explanation:

Process Builder and Screen Flows are two features that can be used to design a business process for identity verification. Process Builder is a tool that allows you to automate business processes by creating workflows that trigger actions based on certain criteria. Screen Flows are a type of flow that guide users through a series of screens to collect and update data. You can use Process Builder to launch a Screen Flow when a customer contacts the bank, and use the Screen Flow to capture and verify the customer's identity information.

References: [Process Automation], [Screen Flows]

NEW QUESTION # 125

The Salesforce Admin at Lake Tahoe Bank considering implementing Financial Services Cloud. What is the best way for the Admin to access a Financial Services pre-configured org, including data and the right licenses, to learn about the product?

- A. Request a 30-day Financial Services Cloud trial org
- B. Request a Salesforce developer org.
- C. Spin up a Salesforce sandbox org.
- D. Purchase one license of Financial Services Cloud and install it in a production org.

Answer: A

Explanation:

The best way for the Admin to access a Financial Services Cloud pre-configured org, including data and the right licenses, to learn about the product is to request a 30-day Financial Services Cloud trial org. You can sign up for the 30-day trial using this form 4. You get pre-configured and preloaded sample data so you can start playing around in your new org right away. Once you're done testing it out, you can transition your trial org to a production org with the help of your account executive or solution engineer.

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NEW QUESTION # 126

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