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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q21-Q26):

NEW QUESTION # 21

What benefits do Flows for Financial Services Cloud offer to support customer onboarding? (Choose Two)

- A. Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling

- B. Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to * navigate to different screens.
- C. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- D. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- E. Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.

Answer: B,D

Explanation:

Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to navigate to different screens. Flows can simplify and streamline the customer onboarding process by automating tasks and collecting information in an easy and intuitive way. You can use Flows to create service requests that capture the customer's details and update the related records in one place.

Flows enable customers to schedule appointments via customer communities, mobile apps. or websites. Flows can integrate with Experience Cloud sites, mobile apps, or websites to provide self-service options for customers. You can use Flows to create appointment scheduling forms that allow customers to book appointments with the right specialist at the right time and place. Verified References: : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 22

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

Answer: A,B,C

Explanation:

To capture and display commercial customers and their parent companies, Lake Tahoe Bank SF Admin can use the following steps: Add the Business record type to the Group record type mapper, which is a custom metadata type that defines which record types can be added as members of a group¹.

Leverage Groups to capture the majority owner of a commercial customer, which is a business entity that has a stake in another business entity¹. Groups are a feature that allows users to create and manage household and business relationships¹.

Use Account hierarchy to capture minority owners of a commercial customer, which are business entities that have less than 50% stake in another business entity². Account hierarchy is a feature that allows users to see how accounts are related to each other in a parent-child relationship².

Link multiple owners to the business entity as a Group, which allows users to see all the stakeholders of a commercial customer in one place¹

NEW QUESTION # 23

Lake Tahoe Bank has branch offices in many countries around the world and they are planning to roll out Financial Services Cloud. Which of the 2 considerations does the Salesforce Admin have to keep in mind when it comes to dealing with multiple currencies?

- A. When multicurrency is enabled in FSC, advanced currency management is also available
- B. When filtering by currency values in reports or list views, users must specify a currency ISO code, such as USD or GBP, before the value.
- C. The Salesforce Admin can enable or disable multiple currencies if needed
- D. For each user, the user currency must correspond to the default currency for the user's locale

Answer: A,B

Explanation:

Multicurrency is a feature in Salesforce that allows you to work with multiple currencies in your org. If you enable multicurrency in FSC, you need to consider the following:

When filtering by currency values in reports or list views, users must specify a currency ISO code, such as USD or GBP, before the value. For example, USD500 or GBP300.

When multicurrency is enabled in FSC, advanced currency management is also available. This feature allows you to track historical exchange rates and apply them to opportunities and forecasts.

NEW QUESTION # 24

Salesforce provides a robust set of automation features to help save time and resources. For example, a system administrator can use Flow Builder to automate most of an organization's repetitive business processes.

Which use case is a suitable fit for Flow Builder?

- A. Perform an operation for more records than schedule-triggered flows allow
- B. Coordinate multiple flows and assign them to multiple teams or individuals.
- C. Suggest offers and actions to users that are tailored to meet an organization's unique business criteria.
- **D. Collect input from internal users with a form placed on a Lightning page or launched by a button.**

Answer: D

Explanation:

A suitable use case for Flow Builder is to collect input from internal users with a form placed on a Lightning page or launched by a button. Flow Builder is a tool that allows users to automate business processes by building flows that guide users through screens, execute logic, manipulate data, and interact with Salesforce and external systems. By using Flow Builder, the system administrator can create a flow that collects input from internal users with a form and performs actions based on the input.

NEW QUESTION # 25

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

Answer: A,B,C

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.

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