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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q41-Q46):

NEW QUESTION # 41

The Salesforce Admin wants to make it easier for call center agents to complete some common tasks by setting up flows and launch them from the Retail Banking Console. What does the Admin have to keep in mind when setting up Flows?

- A. To use a Flow, a user must have access to the underlying object and its field
- B. To open, edit, or create a Flow in Flow Builder, the user needs the Run Flows permission.
- C. To use Financial Services Cloud Flows, you'll need the Financial Services Managed Package installed in the org and the Financial Services Cloud a permission set assigned to the user.
- D. Flows can be used to provide step-by-step guidance for address changes, without the need for then agent to navigate to different screens.

Answer: C

NEW QUESTION # 42

Lake Tahoe Bank, an existing Salesforce customer, is planning to implement Financial Services Cloud. Their Salesforce Admin is considering whether to use a new Salesforce org or upgrade the existing org. Which three of the considerations below indicate that a new Salesforce org is the better choice?

- A. The bank has limited redesign opportunities for business capabilities.
- B. The current implementation is using a product-centric view and the bank wants to move to a customer-centric view.
- C. The bank wants to use this project as an opportunity to retire customization.
- D. Data migration is a big concern. The current org has a large amount of data and the Bank wants to minimize data migration efforts.
- E. Existing business capabilities and processes can be redesigned to deliver a higher business impact.

Answer: B,C,E

Explanation:

The following considerations indicate that a new Salesforce org is the better choice for implementing Financial Services Cloud:

The bank wants to use this project as an opportunity to retire customization. A new org will allow the bank to start fresh and avoid carrying over unnecessary or outdated customization that may conflict with Financial Services Cloud features or best practices.

The current implementation is using a product-centric view and the bank wants to move to a customer-centric view. A new org will allow the bank to adopt the Financial Services Cloud data model, which is designed to provide a holistic view of the customer and their relationships, goals, financial accounts, activities, and interactions.

Existing business capabilities and processes can be redesigned to deliver a higher business impact. A new org will allow the bank to leverage the Financial Services Cloud capabilities, such as Action Plans, Relationship Groups, Rollup By Lookup, Service Processes, etc., to optimize their business processes and enhance their customer experience. Verified References: : Salesforce Help Article 6

NEW QUESTION # 43

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

- A. Round Robin Referral Routing
- B. Referral Conversion
- C. Assigning a Referral
- D. Referral Automated Approvals
- E. Accepting a Referral

Answer: B,C,E

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 # 44

Which three record type options should an advisor configure for a Lead object configuration?

- A. Retirement Planning
- B. General
- C. Referral
- D. Adjustments
- E. Opportunity

Answer: A,B,C

Explanation:

Reference: Financial Services Cloud - Account and Contact Record Types | Salesforce Help Explanation: Record types are a way to categorize records in Salesforce based on different business processes or requirements. Record types can have different page layouts, picklist values, and business logic. For the Lead object, a financial services company can create different record types to capture different types of leads based on their source, interest, or qualification. Some examples of record types for the Lead object are:

Referral: This record type can be used to capture leads that are referred by existing clients or partners.

Referral leads can have fields such as Referrer Name, Referrer Account, and Referral Type to track the source and nature of the referral.

General: This record type can be used to capture leads that are generated from general marketing campaigns or events. General leads can have fields such as Campaign Name, Campaign Source, and Lead Score to track the effectiveness and potential of the marketing efforts.

Retirement Planning: This record type can be used to capture leads that are interested in retirement planning services or products. Retirement planning leads can have fields such as Retirement Age, Retirement Goal, and Current Savings to assess the needs and suitability of the leads.

NEW QUESTION # 45

A wealth management division manages the financial assets of many wealthy clients.

Which three steps should the Financial Services Cloud consultant take to offer a high level of customization to boost user productivity?

- A. Create and assign the Custom Field Set permission set to all users.
- B. Create a new type of person account so trust group details roll down to the beneficiaries level.
- C. Assign the Custom Field Set To a Lightning component.
- D. Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers.
- E. Assign the Custom Field Set to the Financial Summary component.

Answer: C,D,E

Explanation:

The following steps should be taken by the consultant to offer a high level of customization to boost user productivity for the wealth management division:

Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers. A Custom Field Set is a construct in Financial Services Cloud that allows you to define a collection of fields that can be displayed in a Lightning component, such as the Financial Summary or the Financial Account List.

You can use Custom Field Sets to customize the fields that are relevant for different user groups or business scenarios, without modifying the underlying data model or page layout. You can create a Custom Field Set by going to Setup > Object Manager > Financial Account > Field Sets and adding or removing fields according to your requirements.

Assign the Custom Field Set to the Financial Summary component. The Financial Summary component is a Lightning component that displays aggregated financial data for a selected record, such as an account, contact, or opportunity. You can use the Financial Summary component to provide a holistic view of your client's financial situation and goals. You can assign a Custom Field Set to the Financial Summary component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel.

Assign the Custom Field Set To a Lightning component. A Lightning component is a reusable unit of user interface that can be added to any Lightning page, such as record pages, app pages, or Home pages. You can use Lightning components to enhance the functionality and user experience of your pages. You can assign a Custom Field Set to a Lightning component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 : Salesforce Help Article 3

NEW QUESTION # 46

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