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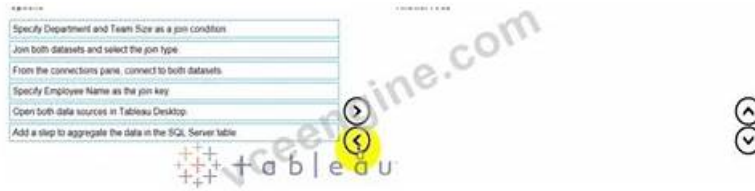
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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q167-Q172):

NEW QUESTION # 167
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 enable customers to schedule appointments via customer communities, motxie apps. or websites.
- C. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- D. 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.
- 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 # 168
What steps does the Salesforce Administrator have to take to create a new Business Milestone Type?

- A. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field
- B. In the Object Manager go to the Business Milestone object and create a new field using the name of the new milestone.
- C. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
- D. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component

Answer: A

Explanation:
To create a new Business Milestone Type, you need to add a new picklist value on the Milestone Type field of the Business Milestone object. This field is used to categorize the different types of business milestones that can be tracked for a client. Verified Reference: : Salesforce Financial Services Cloud Implementation Guide, page 57.

NEW QUESTION # 169
Cumulus Insurance's business processes are quite complex, and steps in the process may vary depending on the information captured.
Which three actions regarding functionality and features should a consultant suggest exploring to help guide Cumulus Insurance users through these processes?

- A. Configure Dynamic Actions for Lightning pages.
- B. Configure Dynamic Lightning pages.
- C. Enable In-App Guidance to provide walk-throughs.
- D. Use flows to remove the neea for complex Lightning pages.
- E. Build custom Lightning pages that correspond to each stage of the business process.

Answer: A,C,D

Explanation:
The following actions regarding functionality and features should be suggested to help guide Cumulus Insurance users through their complex business processes:
Configure Dynamic Actions for Lightning pages. Dynamic Actions are a feature that allows you to customize the actions that appear on a Lightning page based on criteria such as record type, field value, device type, or user profile. You can use Dynamic Actions to show or hide actions that are relevant or irrelevant for each stage of the business process, such as creating a case, sending an email, or generating a quote.
Enable In-App Guidance to provide walk-throughs. In-App Guidance is a feature that allows you to create prompts and guided tours that appear within the Salesforce app to help users learn new features, complete tasks, or adopt best practices. You can use In-App Guidance to provide step-by-step guidance for complex business processes, such as onboarding a customer, submitting a claim, or renewing a policy.
Use flows to remove the need for complex Lightning pages. Flows are a tool that allows you to automate business processes and guide usersor customers through screens that collect and display information. Flows can have multiple steps and branching logic that ask for different information depending on the responses.
You can use flows to simplify and streamline complex business processes, such as applying for a loan, enrolling in a plan, or changing a beneficiary. Verified References: : Salesforce Help Article [12] : Salesforce Help Article [13] : Salesforce Help Article [14]

NEW QUESTION # 170

In Financial Services Cloud, what is the criteria for commas and symbols to be displayed correctly on the Financial Account Summary component?

- A. User's locale and language must match user's currency.
- B. Account currency must match org default currency.
- C. User's locale must match user's currency.
- D. User currency must match org default currency.

Answer: C

Explanation:
The criteria for commas and symbols to be displayed correctly on the Financial Account Summary component is that user's locale must match user's currency. The locale is a setting that determines how dates, times, numbers, and currencies are formatted and displayed for a user. The currency is a setting that determines how monetary amounts are formatted and displayed for a user. By matching the user's locale with their currency, FSC can ensure that commas and symbols are displayed correctly on the Financial Account Summary component according to the user's preferences and expectations

NEW QUESTION # 171

During a Financial Services Cloud implementation at an insurance company, a consultant needs to design a broker data model for the broker web portal. The given requirements are:
1. Brokers are treated individually, even if they are associated with the same company.
2. Brokers should never have access to other brokers' data.
3. Brokers can nominate their assistants to access the broker portal.
4. An assistant can sometimes work for multiple brokers.
Which two considerations should the consultant consider regarding the data model?

- A. The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers.
- B. The Broker Assistant should be modeled as a Contact. Then, use Contact to Contact association if they need work for multiple D Brokers.
- C. Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group 1-1 Account to model their company.
- D. Brokers should be modeled as Contact and the Broker company should be modeled as Account, even if they're a legal entity '-' individually.

Answer: A,C

Explanation:
Explanation
The following considerations should be considered regarding the data model for the broker web portal:
The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers. This is because Contacts are records that represent individuals who are associated with an account. By using Contacts, the consultant can capture the personal information of the broker assistants and relate them to their employers. By using Contact to Multiple Accounts features, the consultant can enable a contact to have relationships with multiple accounts and specify different roles and start and end dates for each relationship.
Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group to model their company. This is because Accounts are records that represent business entities or organizations that are involved in business transactions with your company. By using Accounts, the consultant can capture the business information of each broker and treat them as legal entities in Salesforce. By using Contacts, the consultant can capture the personal information of each broker and relate them to their accounts. By using Groups, which are records that represent collections of accounts or contacts that share financial goals or characteristics, the consultant can model the broker company and associate multiple brokers with it

NEW QUESTION # 172
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