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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q126-Q131):

NEW QUESTION # 126
Cumulus Bank wants to use Interactions to capture conversations that investment bankers have with their clients. Due to the sensitive nature of the interactions, the bank needs to carefully limit access to the detailed notes for certain groups. Basic information about attendees and meeting dates is not sensitive.

Which three options should a consultant recommend?

- A. Enable Compliant Data Sharing for Interaction Summaries.
- B. Disable Role-Hierarchy-Based Sharing for Interaction Summaries.
- C. Enable Compliant Data Sharing for Interactions.
- D. Use Interaction Summary Participants to provide the right access to individuals or groups.
- E. Disable Role-Hierarchy-Based Sharing for Engagement Interactions.

Answer: A,B,D

Explanation:
Enable Compliant Data Sharing for Interaction Summaries, Use Interaction Summary Participants to provide the right access to individuals or groups, and DisableRole-Hierarchy-Based Sharing for Interaction Summaries.
Reference: Interaction Summaries | Salesforce Architects
Explanation: Compliant Data Sharing is a feature that allows granular control over access to sensitive data in Financial Services Cloud. By enabling Compliant Data Sharing for Interaction Summaries, the bank can restrict access to the detailed notes field on the Interaction Summary object. By using Interaction Summary Participants, the bank can grant access to specific individuals or groups who need to see the notes for certain interactions. By disabling Role-Hierarchy-Based Sharing for Interaction Summaries, the bank can prevent users from inheriting access to Interaction Summaries from their managers or peers in the role hierarchy.

NEW QUESTION # 127
Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Opportunity
- B. Contact
- C. Lead
- D. Account
- E. Residential Loan Application

Answer: A,D,E

Explanation:
The following records support Document Checklist Items out of the box in Financial Services Cloud:
Account: An Account is a record that represents a person or anorganization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.
Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.
Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services.
You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes,or agreements. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 128
A retail bank is using Financial Services Cloudto support its operations. The bank has received complaints that its clients' documentation is often submitted late and when clients call, customer service agents are struggling with multiple systems to determine where the documentation is.
Which solutionshould a consultant suggest the client explore?

- A. The Send Documents flow for Retail Banking
- B. A Marketing Cloud integration to manage client communications
- C. An APEX solution to leverage the SendMail capabilities of Salesforce
- D. Process Builder to create automatl&Socument requests for missing items

Answer: A

Explanation:

The solution that the consultant should suggest the client explore to improve its clients' documentation submission and tracking is the Send Documents flow for Retail Banking. The Send Documents flow for Retail Banking is a prebuilt flow that allows users to send documents requests to clients via email and track the status of the requests in FSC. The flow uses DocuSign eSignature integration to enable clients to sign and return documents electronically. By using the Send Documents flow for Retail Banking, the consultant can help the client streamline and simplify its document management process and improve its customer service agents' efficiency

NEW QUESTION # 129
Lake Tahoe Bank would like to reslricl their Financial Services Cloud users from viewing certain types of milestones that might be irrelevant to their customersor might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

- A. The Salesforce Admin can manage sensitive Life Events using Permission Sets.
- B. The Salesforce Admin can manage sensitive Life Evenls using sharing rules.
- C. The Salesforce Admin can hide sensitive Life Events on Ihe Life Events component on the Lightning Page using the Properties pane.
- D. The Salesforce Admin can hide the life Event or Business Milestone type, by removing it from the Event Type picklist.

Answer: C

Explanation:
The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane. The Life Events component is a Lightning component that displays a timeline of life events and business milestones for aclient or a group. The Admin can use the Properties pane to customize the component and select which event types to show or hide on the timeline.

NEW QUESTION # 130
A consultant is building an agent console for an insurance company using FlexCards to provide a 360-degree view of its customers. An Integration Procedure will be used to retrieve Account, Opportunity, andContract data. The agent wants the following information displayed:
* Account information including account name, phone, and website
* Active opportunities related to the Account
* Active insurance policies related to the Account
* The ability to view andrenew policies
How should the consultant design the FlexCards to meet these requirements?

- A. Parent FlexCard with single Child and multiple Card States
- B. Parent FlexCard with multiple Cnrrarenand different Card States
- C. Parent FlexCard with single Child and Card Actions
- D. Parent FlexCard with multiple Q**jld Flex Cards and Card Actions

Answer: D

Explanation:
The consultant should design the FlexCards as follows to meet the requirements:
Parent FlexCard with multiple Child Flex Cards and Card Actions. A Parent FlexCard is a construct in Financial Services Cloud that allows you to display information from one record in a card-like format on a Lightning page. A Child FlexCard is a construct in Financial Services Cloud that allows you to display information from related records in a card-like format within a Parent FlexCard. A Card Action is a construct in Financial Services Cloud that allows you to perform actions on a record from within a FlexCard, such as edit, delete, renew, or view details. You can use Parent FlexCards, Child FlexCards, and Card Actions to create an agent console that provides a 360-degree view of your customers and enables quick actions on their records. Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7] : SalesforceHelp Article [8]

NEW QUESTION # 131
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