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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q132-Q137):

NEW QUESTION # 132

The Actionable Relationship Center can display which of the following relationships in the tree pane? Select 3 answers.

- A. Account-Account Relationships
- B. Any Related List for the selected object record
- C. Up to 5 Related Lists for an Account Record
- D. Account-Contact Relationships
- E. Up to 5 Related Lists for a non-Account Record

Answer: A,C,E

NEW QUESTION # 133

For which three objects are Rollup By Lookup (RBL) summaries available?

- A. Claims
- B. Assets and Liabilities
- C. Financial Accounts
- D. Contacts
- E. Life Events

Answer: B,C,D

Explanation:

Explanation

Rollup By Lookup (RBL) summaries are available for the following objects:

Financial Accounts, which are records that represent financial products or services that a client owns or uses¹.

Assets and Liabilities, which are records that represent the value of what a client owns or owes¹.

Contacts, which are records that represent individuals who are associated with an account³.

NEW QUESTION # 134

Which three of these statements are true for Rollup By Lookup (RBL) in Financial Services Cloud?

- A. Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules
- B. The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels
- C. Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.
- D. RBL rules do not require a lot of processing power.
- E. An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.

Answer: A,B,E

Explanation:

Explanation

The following statements are true for Rollup By Lookup (RBL) in Financial Services Cloud:

An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances. You can use RBL rules to aggregate financial account data across different levels of client relationships.

The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels. You can use RBL configuration to define which fields are rolled up and how they are calculated for each diem and group type.

Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules. RBL rules are complex and require extensive testing and validation. If you need to create or customize RBL rules, you should contact a certified Salesforce partner or consultant. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 75. : Salesforce Financial Services Cloud Implementation Guide, page 76. : Salesforce Financial Services Cloud Implementation Guide, page 77.

NEW QUESTION # 135

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a member's Financial Account Balances are not adding up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

- A. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.
- B. Ensure the reported household is the Primary Group for the member.
- C. Ensure the Primary Group flag in the Account record is checked
- D. Ensure that the member is the Primary Member in that Household.
- E. Ensure RollupByLookup Configuration is Active.

Answer: B,E

NEW QUESTION # 136

The investor relations director of a large insurance company just published a press release after the company's Quarterly Earnings Call to report about its digital transformation implementing Salesforce Financial Services Cloud (FSC).

Which three value outcomes should the company's stakeholders expect?

- A. Automated claims orchestration via straight through processing workflow rules from OmniStudio with minimal human intervention from insurance adjusters or underwriters, allowing claims to be completed faster and at scale
- B. Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from the FSC Home Page
- C. Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans
- D. Streamlined the entire deal lifecycle with FSC, leveraging relationship maps and interaction history in business development/discovery to accelerate pipe management and research
- E. Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC

Answer: B,C,E

Explanation:

Explanation

The following value outcomes should the company's stakeholders expect from implementing Salesforce Financial Services Cloud (FSC):

Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC. This outcome means that the company improved its customer satisfaction (CSAT) and net promoter score (NPS) metrics by providing customized and relevant interactions with customers, reducing their waiting time by handling cases more efficiently, and offering self-service options through chatbots powered by artificial intelligence.

Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans. This outcome means that the company enhanced its customer onboarding process by speeding up and streamlining the document management and approval workflow using Action Plans, which are features that allow users to create templates for common client processes, such as account opening, loan application, or financial review.

Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from the FSC Home Page. This outcome means that the company increased its advisor productivity by providing them with a daily task list that shows their priorities and action items, a client life events component that shows important events in their clients' lives, an opportunities component that shows potential sales deals, and an aggregated household information component that shows a holistic view of their clients' financial situation, all on the FSC Home Page

NEW QUESTION # 137

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