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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q161-Q166):

NEW QUESTION # 161

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, and Contract 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 and renew policies

How should the consultant design the FlexCards to meet these requirements?

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

Answer: C

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] : Salesforce Help Article [8]

NEW QUESTION # 162

When importing records from a system outside of Salesforce, which ID should be used to prevent the data import from creating duplicates?

- **A. External ID**
- B. Org ID
- C. Data Load ID
- D. User ID

Answer: A

Explanation:

To prevent the data import from creating duplicates when importing records from a system outside of Salesforce, you should use External ID. External ID is a custom field type that can be used to store unique identifiers from other systems. You can use External ID to match records during data import and avoid creating duplicate records in Salesforce. You can also use External ID to enable upsert operations, which can insert new records or update existing records based on the External ID value. Verified References: : Salesforce Help Article [5] : Salesforce Help Article [6]

NEW QUESTION # 163

Lake Tahoe Bank wants to onboard a client digitally and without asking the client for information that the bank already has on file. The process has multiple steps and can have branching (conditional) logic that asks for different information depending on the responses. Which Salesforce feature should be used for this digital onboarding process?

- **A. Flows**
- B. Actionable Relationship Center
- C. Financial Goals
- D. Action Plans

Answer: A

Explanation:

The Salesforce feature that should be used for the digital onboarding process is Flows. Flows are a tool that can automate business processes and guide users or 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. Flows can also integrate with existing data and prefill fields with information that the bank already has on file, reducing the need to ask the customer for redundant information. Flows

can be embedded in Lightning pages, Experience Cloud sites, mobile apps, or websites to provide a seamless and engaging digital onboarding experience. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 164

Lake Tahoe Bank is evaluating Financial Services Cloud to help them deliver a customer-centric view. They currently have a heavily customized Salesforce implementation with a product-centric design. Lake Tahoe Bank wants to make sure planned changes have a minimal impact on users during implementation. What is the recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank?

- A. Implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org.
- B. Implement Financial Service Cloud in a Trial org and convert the Trial org to production org.
- C. Implement Financial Service Cloud in the existing org's Sandbox and then deploy to production org to mitigate the end-user impact
- D. Implement Financial Service Cloud in the existing org (Brown Field).

Answer: A

Explanation:

The recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank is to implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org. This approach allows Lake Tahoe Bank to leverage the best practices and features of Financial Services Cloud without being constrained by their existing customizations and data model. It also minimizes the impact on users during implementation, as they can continue to use their current system until the new org is ready to go live. A green field implementation requires careful planning, data migration, and change management, but it can result in a more efficient and customer-centric solution. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 8.

NEW QUESTION # 165

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

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

Answer: A,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 # 166

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