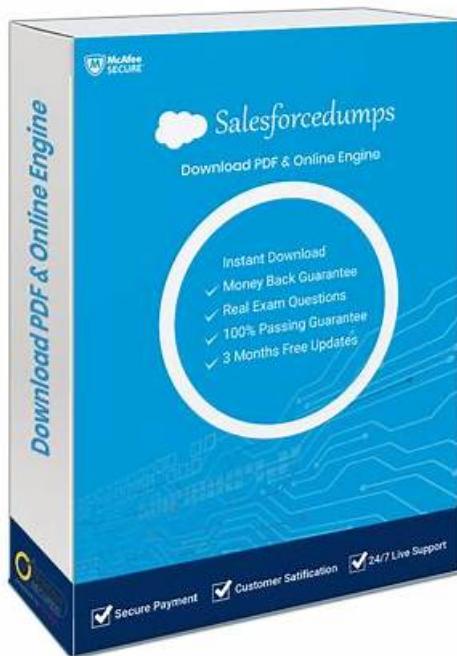


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## **Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q134-Q139):**

### **NEW QUESTION # 134**

What feature does a Salesforce Administrator need to enable so users can see all the referrals for the members of a group?

- A. **Referrals Rollups**
- B. ReferralGroup Process Builder
- C. Group Member Referrals
- D. Referral Scoring

**Answer: A**

Explanation:

Referrals Rollups is a feature that enables users to see all the referrals for the members of a group, such as a branch or a team. It also allows users to filter referrals by status, priority, or owner.

### **NEW QUESTION # 135**

Lake Tahoe Bank has duplicate client records in their current CRM system because they come from a different systems of record. Any changes made in Salesforce should be updated in the source system. What can a Salesforce Administrator do to help bankers get a consolidated view of the individual in the Financial Services Cloud?

- A. Link individuals using related contacts to link duplicate client records
- B. Create a custom Person Account hierarchy to link duplicate client records.
- C. Create custom components to provide a single view of the client.
- D. Implement deduplication rules in Salesforce and let the integration handle the updates to the source system.
- E. **Leverage Financial Services Cloud Relationship Groups to link duplicate client records and create a consolidated view.**

**Answer: E**

Explanation:

A Relationship Group is a construct in Financial Services Cloud that allows you to model complex and dynamic relationships between clients and accounts. You can use Relationship Groups to link duplicate client records and create a consolidated view of their financial data, activities, and interactions. You can also use Relationship Groups to sync data between Salesforce and the source system using external IDs and integration tools. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 67.

### **NEW QUESTION # 136**

A wealth advisor is trying to relate a client to their attorney using the Add Contact option on the relationship tree but can't find any reciprocal roles displayed in the related role lookup. What are two reasons for this?

- A. The user should be using the Member Relationship button under the Actionable Relationship Center.
- B. Sharing rules have not been set up for reciprocal roles.
- C. **The user should be using the Edit Group button to access reciprocal roles.**
- D. Reciprocal roles have not been created in the org.

**Answer: C,D**

Explanation:

Reference: Configure Reciprocal Roles - Salesforce

Explanation: Some possible reasons why the user can't find any reciprocal roles displayed in the related role lookup are: Reciprocal roles have not been created in the org. Reciprocal roles are custom objects that define the possible roles for users who need access to Account or Contact records. For example, a reciprocal role can be Advisor, Client, Specialist, or Decision Maker. Each reciprocal role has an associated access level that determines what data fields the user can view or edit. To create reciprocal roles, the administrator needs to do the following steps:

From Setup, open Object Manager.

In the Quick Find box, enter Reciprocal Role, and then select Reciprocal Role.

Click Fields & Relationships, and then select Role Name.

Click New to create a new picklist value for the Role Name field.

Enter a label and a value for the new role, such as Attorney or Client.

Click Save.

The user should be using the Edit Group button to access reciprocal roles. The Add Contact option on the relationship tree only allows the user to add existing contacts as members of a relationship group, such as a household or a business group. The user cannot specify reciprocal roles for the members using this option. To specify reciprocal roles for the members of a relationship group, the user needs to do the following steps:

Click Edit Group on the relationship group record page.

In the Edit Group window, click Member Relationships.

For each member of the group, select a role from the Role picklist and a related role from the Related Role lookup.

Click Save.

### NEW QUESTION # 137

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 RollUpByLookup Configuration is Active
- B. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.
- 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 the reported Household is the Primary Group for the member

**Answer: A,E**

Explanation:

To troubleshoot the issue of Financial Account Balances not adding up to the Financial Summary field in the related Household, the Admin should take the following steps:

Ensure RollUpByLookup Configuration is Active, which is a custom setting that enables or disables the Rollup By Lookup (RBL) feature. RBL is a feature that allows users to aggregate data from financial accounts and display it at the client and group levels<sup>1</sup>.

Ensure the reported Household is the Primary Group for the member, which is a field on the Account object that indicates whether an account is the primary group for a contact or an individual. The primary group determines which financial summary fields are displayed on the contact or individual page<sup>2</sup>. Verified References: 12

### NEW QUESTION # 138

A banking client currently manages its onboarding process manually with paper forms. To optimize the process, the client wants to digitize and automate as much as possible. The bank wants its clients to manage the forms in a portal and leverage e-signatures for processing.

Which three steps are needed to document this requirement following the discovery session?

- A. Document the business process flows.
- B. Determine the best e-signature solution to use.
- C. Create a visual flow diagram.
- D. Design the solution using the Financial Services Cloud components.
- E. Understand the journey for the multiple personas involved in the process.

**Answer: A,B,E**

Explanation:

The following steps are needed to document the requirement for digitizing and automating the customer onboarding process following the discovery session:

Document the business process flows. You need to document the current and future state of the business process flows for customer onboarding, such as the steps, inputs, outputs, decisions, and dependencies involved in each flow. You can use tools such as diagrams, charts, or tables to illustrate the process flows and identify the pain points, gaps, or opportunities for improvement.

Understand the journey for the multiple personas involved in the process. You need to understand the journey for each persona that participates in or interacts with the customer onboarding process, such as the customer, the client specialist, or the manager. You can use tools such as personas, journey maps, or user stories to capture the needs, goals, pain points, and expectations of each persona and how they experience the process from their perspective.

Determine the best e-signature solution to use. You need to determine the best e-signature solution to use for collecting and processing digital signatures from customers during the onboarding process. You can use tools such as research, analysis, or comparison to evaluate different e-signature solutions based on criteria such as functionality, compatibility, security, cost, or user feedback. Verified References: : Salesforce Help Article [11] : Salesforce Help Article [12] : Salesforce Help Article [13]

## NEW QUESTION # 139

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