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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q91-Q96):

### NEW QUESTION # 91

Lake Tahoe Bank would like to restrict their Financial Services Cloud users from viewing certain types of milestones that might be

irrelevant to their customers or might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

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

**Answer: D**

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 a client 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 # 92

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- A. Make the Adams Household Scott's primary Group and make Scott the primary member
- B. Disable the Primary Group setting for Scott on the Adams Household
- C. Add Scott as a Related Contact to the Adams Household.
- **D. Make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up.**

**Answer: D**

Explanation:

To make sure that Scott's data is rolling up to the Adams Household, the Banker should make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up. A primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use primary Group to roll up financial data from all the financial accounts that are related to the client or the group. By making the Adams Household Scott's primary Group, the Banker can ensure that Scott's financial data is included in the household summary. The Banker can also edit the Activities & Objects to Roll Up to specify which items, such as financial accounts, goals, or referrals, should be rolled up for Scott. Verified References: : Salesforce Help Article 4

### NEW QUESTION # 93

An insurance company aims to improve a call center's productivity. A detailed analysis discovered that agents spend a lot of time capturing data while adding and updating beneficiary details. Capturing premium payment details (payment date and frequency) is another time-consuming task. Which action should a Financial Services Cloud consultant take to resolve the issue?

- A. Install an Insurance Data AppExchange package.
- **B. Utilize Insurance Flow Templates.**
- C. Create an Action Plan Template for capturing beneficiary data and payment information.
- D. Provide a better user interface by building Lightning web components for beneficiary data and payment information.

**Answer: B**

Explanation:

A Financial Services Cloud consultant can suggest utilizing Insurance Flow Templates to resolve the issue of improving the call center's productivity and reducing the time spent on capturing data for beneficiary details and premium payment details. Insurance Flow Templates are prebuilt flow templates that guide users through the steps of creating or updating insurance policies and beneficiaries in Financial Services Cloud. The templates can be customized to suit the specific needs and requirements of the insurance company. By using Insurance Flow Templates, the call center agents can streamline their data entry process and provide better service to their customers.

References:

[Insurance Flow Templates]

[Customize Insurance Flows]

### NEW QUESTION # 94

A new custom object has been created, and the records of this object will be created through integration with another system. What should a consultant do to ensure the data is loading into the correct fields in Financial Services Cloud?

- A. Utilize a field mapping file with the external system (allocation and the corresponding field in Salesforce)
- B. Use a CSV file with the data created and use Data Loader to map to the correct field
- C. Create a junction object between the external system and the new customer object where the data will reside
- D. Ensure custom metadata is configured and each custom metadata record details where the data will be sent

**Answer: A**

Explanation:

To ensure the data is loading into the correct fields in Financial Services Cloud, the consultant should utilize a field mapping file with the external system allocation and the corresponding field in Salesforce. A field mapping file is a file that specifies how fields from an external system map to fields in Salesforce. By using a field mapping file, the consultant can ensure that the data from the new custom object is imported into the correct fields in Financial Services Cloud and avoid any data loss or inconsistency.

### NEW QUESTION # 95

What steps does the Salesforce Administrator have to take to create a new Business Milestone Type?

- A. Find Person Life Event 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. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component
- D. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field

**Answer: D**

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 References: : Salesforce Financial Services Cloud Implementation Guide, page 57.

### NEW QUESTION # 96

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