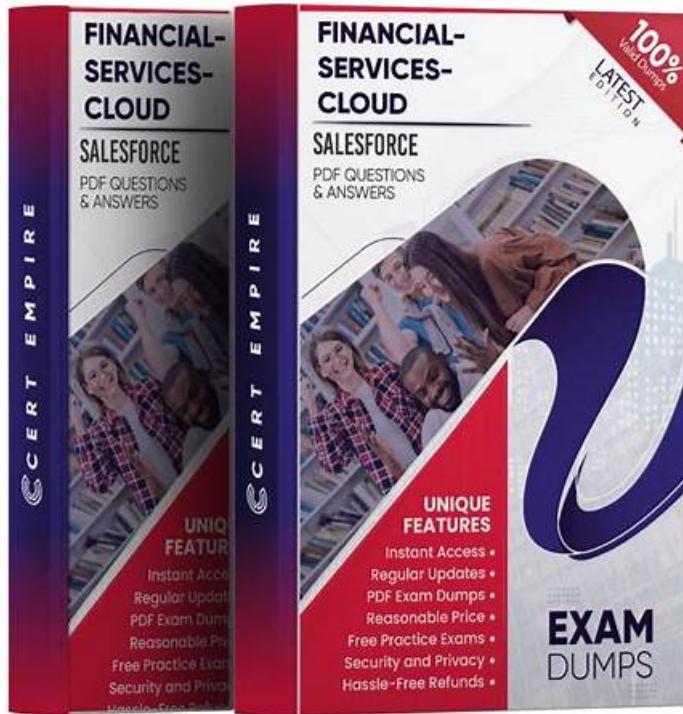


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## **Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q128-Q133):**

### **NEW QUESTION # 128**

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify a published Action Plan to support an additional task she needs in order to complete an annual review for a client. How should Jen do this?

- A. Use the 'task creator' tool to create a new task and associate with the existing Action Plan
- B. Create an independent Task not related to original Action Plan
- **C. Use the Action Plan item feature to add an additional task to a published Action Plan.**
- D. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.

**Answer: C**

### **NEW QUESTION # 129**

Lake Tahoe Bank needs to conduct periodic reviews with their customers to review credit & debit card usage, review account payables and discuss credit needs. The bank wants to ensure such activities are tracked and exceptions are reported & followed up on in a timely manner. How can Financial Services Cloud support these requirements?

- A. Train account owners to create required tasks periodically and set due dates for tracking.
- **B. Create an Action Plan Template with associated pre-determined Tasks and automate the periodical creation of Action Plans for customer accounts.**
- C. Use Lightning Scheduler to periodically schedule tasks for account owners.
- D. Run a nightly process to create tasks and assign them to account owners for follow-ups

**Answer: B**

Explanation:

Explanation

As explained in the previous question, Action Plans are a feature that can help users track and manage common client processes. By creating an Action Plan Template with associated pre-determined Tasks, such as reviewing credit & debit card usage, reviewing account payables, and discussing credit needs, users can ensure that these activities are tracked and followed up on in a timely manner. Users can also automate the periodical creation of Action Plans for customer accounts using Process Builder or Apex triggers.

### **NEW QUESTION # 130**

If two objects have a parent child relationship, how can a user access the child record from the parent record?

- **A. Related list**
- B. Custom link
- C. Lookup field
- D. Child field

**Answer: A**

### **NEW QUESTION # 131**

Sam is the Salesforce Admin for Valley Bank. The bank's financial advisors are complaining they can't see an accurate summary of their client's financial data as clients often change households. Sam wants to give his financial advisors a better view of the client's complete financial situation. How can he set this up using FSC?

- **A. Set client's financial data to be rolled up using Primary Group feature**
- B. Create a custom object to track the client's financial data

- C. Use Process Builder to create a workflow to summarize data at the Person Account level

**Answer: A**

### NEW QUESTION # 132

An investment banker is looking to take detailed meeting notes and share them easily with his colleagues while specifying confidentiality and meeting attendees. Which Financial Services Cloud feature should a consultant recommend in this scenario?

- A. Events
- **B. Interaction Summary**
- C. Engagement Interaction
- D. Notes

**Answer: B**

Explanation:

Interaction Summary is the Financial Services Cloud feature that should be recommended in this scenario.

Interaction Summary is a standard object that represents a summary of an interaction with a client or a group of clients. It allows the user to capture meeting notes, specify confidentiality level, link related records, and associate interaction participants. Interaction Summary can be created from the Interaction Summary component on a record page or from the New Interaction Summary action on a list view or related list.

References: [Interaction Summary Object], [Create an Interaction Summary]

### NEW QUESTION # 133

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