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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q150-Q155):

NEW QUESTION # 150

Users at Lake Bank have been creating multiple events for once in a lifetime event such as birth. What should an Administrator do to prevent users from accidentally creating more than one event of such an event type?

- **A. Create a validation rule that will stop the user if they attempt to add multiple one-time events.**

- B. Remove user's ability to create one-time events
- C. Create an Apex trigger that will prevent the saving of multiple one-time events
- D. Select the Unique checkbox on the picklist value for the Event Type field on the Person Life Event object

Answer: A

Explanation:

To prevent users from accidentally creating more than one event of such an event type, the Admin should create a validation rule that will stop the user if they attempt to add multiple one-time events. A validation rule is a rule that verifies that the data a user enters in a record meets the standards you specify before the user can save the record. By creating a validation rule, the Admin can ensure that only one event of a certain type can be created for each contact.

NEW QUESTION # 151

What benefits do Flows for Financial Services Cloud offer to support customer onboarding? (Choose Two)

- A. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- B. Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to * navigate to different screens.
- C. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- D. Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.
- E. Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling

Answer: A,B

Explanation:

Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to navigate to different screens. Flows can simplify and streamline the customer onboarding process by automating tasks and collecting information in an easy and intuitive way. You can use Flows to create service requests that capture the customer's details and update the related records in one place.

Flows enable customers to schedule appointments via customer communities, mobile apps. or websites. Flows can integrate with Experience Cloud sites, mobile apps, or websites to provide self-service options for customers. You can use Flows to create appointment scheduling forms that allow customers to book appointments with the right specialist at the right time and place. Verified

Reference: : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 152

Cumulus Bank is migrating its CRM software from a legacy application to Salesforce Financial Services Cloud (FSC). The bank hired Salesforce Professional Services to configure/deploy the new Salesforce FSC org and migrate data.

Which order should a consultant follow when performing the data migrations?

- A. Financial Accounts, then Financial Account Transactions, then Financial Account Roles, then Individuals
- B. Financial Accounts, then Financial Account Roles, then Individuals, then Financial Account Transactions
- C. Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions
- D. Individuals, then Financial Account Roles, then Financial Accounts, then Financial Account Transactions

Answer: C

Explanation:

Explanation

The order that the consultant should follow when performing the data migrations is Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions. This order ensures that the data dependencies and relationships are maintained and that the data integrity and quality are preserved. By migrating Individuals first, the consultant can create the records that represent the customers of the bank. By migrating Financial Accounts next, the consultant can create the records that represent the financial products or services that the customers own or use. By migrating Financial Account Roles next, the consultant can create the records that link the individuals to the financial accounts and define their roles or relationships with those accounts. By migrating Financial Account Transactions last, the consultant can create the records that represent the transactions or activities that occur on the financial accounts.

NEW QUESTION # 153

The Salesforce Admin wants to make it easier for call center agents to complete some common tasks by setting up flows and launch them from the Retail Banking Console. What does the Admin have to keep in mind when setting up Flows?

- A. Flows can be used to provide step-by-step guidance for address changes, without the need for then agent to navigate to different screens.
- **B. To use Financial Services Cloud Flows, you'll need the Financial Services Managed Package installed m the org and the Financial Services Cloud a permission set assigned to the user.**
- C. To use a Flow, a user must have access to the underlying object and its field
- D. To open, edit, or create a Flow in Flow Builder, the user needs the Run Flows permission.

Answer: B

NEW QUESTION # 154

The Salesforce Admin wants to make it easier for call center agents to complete some common tasks by setting up flows and launch them from the Retail Banking Console. What does the Admin have to keep in mind when setting up Flows?

- **A. To use a Flow, a user must have access to the underlying object and its field**
- **B. Flows can be used to provide step-by-step guidance for address changes, without the need for then agent to navigate to different screens.**
- **C. To use Financial Services Cloud Flows, you'll need the Financial Services Managed Package installed m the org and the Financial Services Cloud a permission set assigned to the user.**
- D. To open, edit, or create a Flow in Flow Builder, the user needs the Run Flows permission.

Answer: A,B,C

NEW QUESTION # 155

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