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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q142-Q147):

NEW QUESTION # 142

A financial services company is migrating a legacy customer relationship management system to Financial Services Cloud (FSC). The company is requesting that its consulting partner introduce specific customer interaction features mapped to its business processes.

What should the consultant consider when introducing the FSC features?

- A. If there is a business process for showing common interests and needs across the company's clients, the Interaction Summaries component is recommended to use.

- B. If there is a business process for taking detailed notes for client meetings and adding action items, the Action Plan component is recommended to use.
- C. If there is a business process for tracking the customer life events and milestones, and timely reminding of opportunities, the Action Plan component is recommended to use.
- D. If there is a business process for limiting role-based data visibility, the Interaction Summaries component is recommended to use.

Answer: B

Explanation:

Reference: Action Plans in Financial Services Cloud for Admins | Salesforce Trailhead Explanation: Action Plans are a feature of Financial Services Cloud that allow users to create and execute repeatable tasks based on predefined templates. Action Plans can help streamline and standardize business processes, such as onboarding new clients, conducting annual reviews, or resolving service requests. Action Plans can also capture detailed notes for client meetings and add action items to follow up.

NEW QUESTION # 143

Which two statements are true for a Group in Financial Services Cloud?

- A. A group is a type of account record that people and businesses can be related to through the account contact relationship object.
- B. Financial Services Cloud includes a group record type for households
- C. A group is a type of account record that people and businesses can be related to through the Financial Account relationship object
- D. Financial Services Cloud includes a group record type for businesses

Answer: A,B

Explanation:

The following statements are true for a Group in Financial Services Cloud:

Financial Services Cloud includes a group record type for households, which is a record type that represents a collection of individuals who share financial goals, such as family members or roommates.

A group is a type of account record that people and businesses can be related to through the account contact relationship object, which is a junction object that links an account to a contact or an individual and defines their role or relationship with that account.

NEW QUESTION # 144

A wealth management division manages the financial assets of many wealthy clients.

Which three steps should the Financial Services Cloud consultant take to offer a high level of customization to boost user productivity?

- A. Create a new type of person account so trust group details roll down to the beneficiaries level.
- B. Create and assign the Custom Field Set permission set to all users.
- C. Assign the Custom Field Set To a Lightning component.
- D. Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers.
- E. Assign the Custom Field Set to the Financial Summary component.

Answer: C,D,E

Explanation:

The following steps should be taken by the consultant to offer a high level of customization to boost user productivity for the wealth management division:

Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers. A Custom Field Set is a construct in Financial Services Cloud that allows you to define a collection of fields that can be displayed in a Lightning component, such as the Financial Summary or the Financial Account List.

You can use Custom Field Sets to customize the fields that are relevant for different user groups or business scenarios, without modifying the underlying data model or page layout. You can create a Custom Field Set by going to Setup > Object Manager > Financial Account > Field Sets and adding or removing fields according to your requirements.

Assign the Custom Field Set to the Financial Summary component. The Financial Summary component is a Lightning component that displays aggregated financial data for a selected record, such as an account, contact, or opportunity. You can use the Financial Summary component to provide a holistic view of your client's financial situation and goals. You can assign a Custom Field Set to

the Financial Summary component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel.

Assign the Custom Field Set To a Lightning component. A Lightning component is a reusable unit of user interface that can be added to any Lightning page, such as record pages, app pages, or Home pages. You can use Lightning components to enhance the functionality and user experience of your pages. You can assign a Custom Field Set to a Lightning component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 : Salesforce Help Article 3

NEW QUESTION # 145

Lake Tahoe Bank is rolling out Financial Services Cloud and the VP of IT is concerned about the cost of the licenses. The System Admin recommends using restricted licenses for users that need only limited access to Financial Service Cloud features. Which Financial Services Cloud permission set license enables user access to a license with contractual restrictions for Financial Services Cloud and can be used to grant restricted access to users like Bank Tellers?

- A. Client Segmentation
- **B. Financial Service Cloud Basic**
- C. Financial Services Cloud Standard
- D. Financial Service Cloud Extension

Answer: B

Explanation:

To grant restricted access to users like Bank Tellers who need only limited access to Financial Services Cloud features, the Admin can use Financial Service Cloud Basic permission set license. This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL).

NEW QUESTION # 146

Lake Tahoe Bank is implementing Financial Services Cloud. The bank's new business processes require that Financial Advisors can add individuals to more than one Group or Household using Multiple Relationship Groups. Where do Admins enable Multiple Relationship Groups?

- A. Lightning Page Editor
- B. Profiles
- C. Object Settings
- **D. Custom Settings**

Answer: D

Explanation:

To enable Multiple Relationship Groups, which is a feature that allows users to add individuals to more than one group or household, the Admin needs to use Custom Settings. Custom Settings are similar to custom objects and enable application developers to create custom sets of data, as well as create and associate custom data for an organization, profile, or specific user. The Admin can use Custom Settings to enable Multiple Relationship Groups by following these steps:

From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.

Click Manage next to Group Member Record Type Mapper.

Click Edit next to Default Organization Level Value.

In Multiple Relationship Groups Enabled, select True.

Click Save.

NEW QUESTION # 147

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