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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q117-Q122):

NEW QUESTION # 117

A financial services company would like its users to be able to relate two business accounts. What should the administrator configure to meet the requirement?

- A. Update the Role picklist on the Account-Contact Relationship object with new value.
- B. Create a new Account Reciprocal Role for the required value.
- C. Create a new Contact Reciprocal Role for the required value.
- **D. Update the Role picklist on the Account-Account Relationship object with new value.**

Answer: D

Explanation:

To configure Financial Services Cloud to allow users to relate two business accounts, the administrator should update the Role picklist on the Account-Account Relationship object with new value. The Role picklist is a field on the Account-Account Relationship object that defines the type of relationship between two accounts, such as Household Member, Business Owner, Trustee, or Friend. The Role picklist is used to filter and display the account-account relationships in the Actionable Relationship Center (ARC). To update the Role picklist, you need to go to Setup > Object Manager > Account-Account Relationship > Fields & Relationships > Role and add or remove values according to your business needs. Verified References: : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 118

Lake Tahoe Bank's System Administrator is implementing intelligent Need-Based Referrals in Salesforce.

Referrals are modeled on the Lead object. Which three Lead features can the System Admin use for Intelligent Need-Based Referrals?

- A. Lead Approval
- B. Lead Routing
- C. Lead Assignment Rules
- D. Einstein Lead Scoring
- E. Web to-Lead

Answer: B,C,D

Explanation:

The System Admin can use the following Lead features for Intelligent Need-Based Referrals:

Lead Routing, which is a feature that allows users to distribute leads to the right users or queues based on criteria such as lead source, industry, or product interest.

Lead Assignment Rules, which are rules that specify how to assign leads to users or queues when they are created manually, captured from the web, or imported via Data Import Wizard.

Einstein Lead Scoring, which is a feature that uses artificial intelligence to analyze historical data and predict how likely a lead is to convert. Einstein Lead Scoring assigns a score and an insight to each lead, which can help users prioritize and follow upon the most promising leads.

NEW QUESTION # 119

Cumulus Insurance's business processes are quite complex, and steps in the process may vary depending on the information captured.

Which three actions regarding functionality and features should a consultant suggest exploring to help guide Cumulus Insurance users through these processes?

- A. Enable In-App Guidance to provide walk-throughs.
- B. Configure Dynamic Lightning pages.
- C. Build custom Lightning pages that correspond to each stage of the business process.
- D. Use flows to remove the need for complex Lightning pages.
- E. Configure Dynamic Actions for Lightning pages.

Answer: A,D,E

Explanation:

The following actions regarding functionality and features should be suggested to help guide Cumulus Insurance users through their complex business processes:

Configure Dynamic Actions for Lightning pages. Dynamic Actions are a feature that allows you to customize the actions that appear on a Lightning page based on criteria such as record type, field value, device type, or user profile. You can use Dynamic Actions to show or hide actions that are relevant or irrelevant for each stage of the business process, such as creating a case, sending an email, or generating a quote.

Enable In-App Guidance to provide walk-throughs. In-App Guidance is a feature that allows you to create prompts and guided tours that appear within the Salesforce app to help users learn new features, complete tasks, or adopt best practices. You can use In-App Guidance to provide step-by-step guidance for complex business processes, such as onboarding a customer, submitting a claim, or renewing a policy.

Use flows to remove the need for complex Lightning pages. Flows are a tool that allows you to automate business processes and guide users or customers through screens that collect and display information. Flows can have multiple steps and branching logic that

ask for different information depending on the responses.

You can use flows to simplify and streamline complex business processes, such as applying for a loan, enrolling in a plan, or changing a beneficiary. Verified References: : Salesforce Help Article [12] : Salesforce Help Article [13] : Salesforce Help Article [14]

NEW QUESTION # 120

An investment bank is implementing Financial Services Cloud (FSC) to manage the deal pipeline. Each opportunity has confidential information that the deal team members must only view. In addition, each member needs the ability to take and share notes directly within Salesforce with others on the team.

Which three FSC features should be part of the solution design?

- A. Compliance Sharing
- B. Financial Deal Management
- C. Profiles
- D. Sharing Rules
- E. Interaction Summaries

Answer: B,D,E

Explanation:

The following FSC features should be part of the solution design for managing confidential deal information and notes sharing among deal team members:

Financial Deal Management: Financial Deal Management is a feature in Financial Services Cloud that allows you to track and manage complex deals that involve multiple parties, products, and stages. You can use Financial Deal Management to store confidential deal information such as deal name, amount, status, or participants. You can also use Financial Deal Management to associate opportunities, products, or tasks with a deal.

NEW QUESTION # 121

When importing records from a system outside of Salesforce, which ID should be used to prevent the data import from creating duplicates?

- A. Data Load ID
- B. User ID
- C. Org ID
- D. External ID

Answer: D

Explanation:

To prevent the data import from creating duplicates when importing records from a system outside of Salesforce, you should use External ID. External ID is a custom field type that can be used to store unique identifiers from other systems. You can use External ID to match records during data import and avoid creating duplicate records in Salesforce. You can also use External ID to enable upsert operations, which can insert new records or update existing records based on the External ID value. Verified References: : Salesforce Help Article [5] : Salesforce Help Article [6]

NEW QUESTION # 122

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