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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q138-Q143):

### NEW QUESTION # 138

Which step is required to give a group of users access to a Financial Deal?

- A. Create a Financial Deal permission set and assign it to the users that should have access to Financial Deals.
- B. Update Industries Settings to give users access to the Financial Dew object.
- C. Change organization-wide defaults (OWD) sharing on the Financial Deal object to Public Read/Write.
- D. Share a financial deal record with a group by adding them as participants to the record from the Financial Deal Participants related list,

**Answer: D**

**Explanation:**

To give a group of users access to a Financial Deal, you need to share a financial deal record with a group by adding them as participants to the record from the Financial Deal Participants related list. The Financial Deal Participants related list is a custom related list on the Financial Deal object that allows you to add users, groups, or queues as participants of a financial deal. Participants can have different roles and access levels for a financial deal, such as Owner, Collaborator, Viewer, or Approver. By adding a

group as a participant, you can grant access to all the members of that group for a specific financial deal. Verified References: :  
Salesforce Help Article [6] : Salesforce Help Article [7]

### NEW QUESTION # 139

A regional bank is implementing Financial Services Cloud (FSC). Today, relationship managers receive email reminders 2 days, 2 weeks, and 2 months after a new customer opens their first bank account to contact the customer for feedback. In addition, the bank wants the ability for relationship managers to track and report on progress in FSC.

What should the administrator do when designing the future state business process using FSC features?

- A. When a lead or referral is converted, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
- B. When creating an account, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
- C. When an account status is changed to "Customer", create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
- D. When an account status is changed to "Customer", send emails to the Account Owner to follow up in 2 days, 2 weeks, and 2 months.

**Answer: C**

Explanation:

To design the future state business process using FSC features, the administrator should create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months when an account status is changed to "Customer".

An action plan is a feature that allows users to create templates for common client processes, such as account opening, loan application, or financial review. An action plan template consists of action plan items that define the tasks, subtasks, and deadlines for each step of the process. By creating an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months when an account status is changed to "Customer", the administrator can automate the email reminder process and track and report on the progress in FSC.

### NEW QUESTION # 140

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce Financial Services Cloud.

When is the Referral Score updated?

- A. The Referral Score updated when a lead is created using the referral record type.
- B. The Referral Score updated when a referral is converted to an Opportunity or closed.
- C. The Referral Score updated when an opportunity associated with the Referral is Closed Won
- D. The Referral Score updated when a referral is assigned from the queue to a user.

**Answer: C**

Explanation:

The Referral Score is updated when an opportunity associated with the Referral is Closed Won. The Referral Score is a metric that measures the quality and quantity of referrals that a user creates or receives. The Referral Score is calculated as the number of referrals converted to opportunities divided by the total number of referrals. The Referral Score is displayed in the Referral Summary component on the user's Home page or record page. The Referral Score is updated whenever a referral is converted to an opportunity or an opportunity is closed as won or lost. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 4

### NEW QUESTION # 141

An administrator is logged into Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.

Assuming there are no other issues, what should happen when the administrator uploads the import file?

- A. The import will fail, since all records in Salesforce must have an owner.
- B. The import will succeed, and the administrator will be prompted to select a user.
- C. The import will succeed, and the administrator will be named as the default Account Owner.
- D. The import will succeed, and the Account Owner field will be left blank.

**Answer: C**

Explanation:

When using Data Loader to insert new records into Salesforce, if the Account Owner field is not specified in the import file, the default owner will be the user who is logged into Data Loader. In this case, since the administrator is logged into Data Loader with their own credentials, they will be assigned as the owner of all the new Business Account records. This behavior is consistent with the standard Salesforce rule that every record must have an owner.

References:

About Data Loader

Mass update Account ownership with Data Loader

### NEW QUESTION # 142

Lake Tahoe Bank allows more than two owners on Financial Accounts. The Salesforce Admin wants to make sure that balances are rolled up to all joint owner's primary Households. Which 2 options does the Salesforce Admin have to accomplish this?

- A. Disable RBL (Rollup By Lookup) rules that rollup balances using joint owner on Financial Account.
- **B. Create custom RBL (Rollup By Lookup) rules to rollup the joint owner balances.**
- C. Enable all RBL (Rollup By Lookup) rules to ensure the balances are rolled up to the household level.
- **D. Enable RBL (Rollup By Lookup) rules that rollup balances using Financial Account Role for joint owners.**
- E. Enable the 'Enable Rollup Summary' in custom settings

**Answer: B,D**

Explanation:

Rollup By Lookup (RBL) is a feature in Financial Services Cloud that allows you to display summary calculations of financial account information, such as balances, market values, and cost bases. You can use RBL to roll up financial data to all joint owners' primary households by doing the following:

Create custom RBL rules to rollup the joint owner balances using the Joint Owner field on the Financial Account object.

Enable RBL rules that rollup balances using Financial Account Role for joint owners using the Account Role field on the Account Contact Relationship object. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 75.

### NEW QUESTION # 143

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