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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q68-Q73):

### NEW QUESTION # 68

A consultant is looking to create a guided screen to be used by customer service agents answering the phone to authenticate the caller and positively identify them. The agent will ask the caller to provide their full name and the last four digits of their social security

number, which is not stored in Salesforce. The agent will enter the provided information into a form, and upon clicking submit, a web service call is made to an external authentication service to authenticate the caller.

What should the consultant do to fulfill the needed requirements?

- A. Create an OmniScript flow.
- B. Create a Lightning web component.
- C. Create a Canvas application for the Authentication module.
- **D. Create a screen flow.**

**Answer: D**

Explanation:

A screen flow is a type of flow that guides users through a series of screens to complete a task or collect information<sup>2</sup>. Screen flows can also interact with external systems using Apex actions or invocable actions<sup>3</sup>.

In this case, the consultant can create a screen flow that collects the caller's name and social security number from the agent, and then invokes an Apex action or an invocable action that makes a web service call to an external authentication service.

### NEW QUESTION # 69

A financial services company must add details to the default business hours record. For company-wide holidays, the company wants the option to skip non-work days in Action Plan when setting task completion dates.

What should the administrator configure to meet the requirement?

- **A. Configure the day without business hours, it is considered a non-work day, even if the day is a recurring holiday.**
- B. Add non-work days to the date offset when calculating the task completion date is automatic; no setup is required.
- C. Select Recurring Holidays as Action Plans and consider recurring holidays when determining the non-work days to skip.
- D. Omit the day's start and end time fields when the administrator wants to indicate a non-working day.

**Answer: A**

Explanation:

To skip non-work days in Action Plan when setting task completion dates, the administrator should configure the day without business hours, as it is considered a non-work day, even if the day is a recurring holiday. This means that the administrator should leave the start and end time fields blank for any day that is not a working day, such as Saturday or Sunday. Action Plans will then automatically omit those days when calculating the task completion dates based on the business hours<sup>1</sup>. Recurring holidays are not considered by Action Plans when determining the non-work days to skip<sup>2</sup>.

References:

Set Business Hours

Set Up Company-wide Holidays

### NEW QUESTION # 70

An investment bank client wants all its users to track client engagements with Interaction Summaries. In addition, those call logs need to be shared with specialists in other lines of business so they can assist in specific types of deals.

Which three Financial Services Cloud standard objects should be used to help accommodate these business requirements?

- **A. Participant Role**
- B. Interaction Participant
- **C. Financial Deal Participant**
- D. Opportunity Participant
- **E. Interaction Summary Participant**

**Answer: A,C,E**

Explanation:

Reference: Track Client Interactions - Salesforce

Explanation: Interaction Summaries are records that capture the details of a client interaction, such as a meeting, a call, or an email. Interaction Summaries can be linked to Financial Deals, which are records that represent a business opportunity or transaction with a client. Interaction Summaries and Financial Deals can have participants, which are records that represent the people or groups involved in the interaction or deal.

Participants can have different roles, such as advisor, client, specialist, or decision maker. Participant Role is a custom object that

defines the possible roles for participants.

#### NEW QUESTION # 71

How can the Salesforce Admin change the configuration to summarize Financial Goals at the household level?

- A. Update the selection in "Activities & Objects to Roll Up" to include Financial Goals
- B. Financial Goals can not be summarized at the household level.
- C. Create a formula field and add it to the Account page layout
- D. Add a custom Rollup By Lookup (RBL) rule.

**Answer: A**

Explanation:

To change the configuration to summarize Financial Goals at the household level, you need to update the selection in "Activities & Objects to Roll Up" to include Financial Goals. This option is available in Setup > Financial Services Settings > Activities & Objects to Roll Up. By selecting Financial Goals, you enable Group-Level Rollups for Financial Goals, which display the total number of goals, completed goals, and completion percentage of all the goals that belong to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 81.

#### NEW QUESTION # 72

A private equity company with only one administrator wants to upgrade Financial Services Cloud (FSC) from a Sales Cloud Unlimited Edition (UE) org. The company decided to install FSC greenfield on a new org to minimize the transfer of existing tech debt. In preparation for data migration, the administrator has been exporting backup files of the current org for a month. What should the administrator do as part of the preparation for the data migration process?

- A. After running the backup data export manually for 2 weeks, the administrator can schedule this job to run weekly every Sunday to review the file on Mondays at the start of the week for data comparisons /analysis.
- B. The administrator can ask the business manager on the investment bank team to review the file directly.
- C. To start, the administrator can run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration.
- D. As a dry run, the administrator can test this process via a data export request from the primary sandbox to the existing Sales Cloud UE org.

**Answer: C**

Explanation:

As part of the preparation for the data migration process, the administrator should run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration. This is a best practice for data migration in Salesforce that allows the administrator to identify the data they want to migrate, create templates for the data, prepare the destination org, and validate the data. By running a daily backup data export for a week, the administrator can capture any changes or updates in the data and compare them with previous exports. By continuing to run this job weekly until they are ready for data migration, the administrator can ensure that they have the most recent and accurate data to migrate into Financial Services Cloud. Verified References: 2

#### NEW QUESTION # 73

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