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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q136-Q141):

NEW QUESTION # 136

The investor relations director of a large insurance company just published a press release after the company's Quarterly Earnings Call to report about its digital transformation implementing Salesforce Financial Services Cloud (FSC).

Which three value outcomes should the company's stakeholders expect?

- A. Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from D the FSC HomeTe
- B. Streamlined the entire deal lifecycle with FSC. leveraging relationship maps and interaction history in business development/discovery D to accelerate pipe management and research
- C. Automated claims orchestration via straight through processing workflow rules from OmniStudio with minimal human intervention from insurance adjusters or underwriters, allowing claims to be completed faster and at scale
- D. Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC
- E. Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans

Answer: A,D,E

Explanation:

The following value outcomes should the company's stakeholders expect from implementing Salesforce Financial Services Cloud (FSC):

Achieved higher CSAT & NPS scores attributed to personalized customer experiences driven by shorter waits due to decreased average case handle times and improved self-service solutions via Einstein Bots for FSC.

This outcome means that the company improved its customer satisfaction (CSAT) and net promoter score (NPS) metrics by providing customized and relevant interactions with customers, reducing their waiting time by handling cases more efficiently, and offering self-service options through chatbots powered by artificial intelligence.

Improved customer onboarding experiences by fast-tracking and simplifying document tracking and approvals via FSC Action Plans. This outcome means that the company enhanced its customer onboarding process by speeding up and streamlining the document management and approval workflow using Action Plans, which are features that allow users to create templates for common client processes, such as account opening, loan application, or financial review.

Drove Advisor productivity with a daily task list, client life events, opportunities, and aggregated household information directly from the FSC Home Page. This outcome means that the company increased its advisor productivity by providing them with a daily task list that shows their priorities and action items, a client life events component that shows important events in their clients' lives, an opportunities component that shows potential sales deals, and an aggregated household information component that shows a holistic view of their clients' financial situation, all on the FSC Home Page

NEW QUESTION # 137

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- B. Create a custom object to track client's financial data
- C. Use Process Builder to create a workflow to summarize data at the Person Account level.
- D. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.

Answer: D

Explanation:

A Primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use Primary Group to roll up financial data from all the financial accounts that are related to the client or the group. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION # 138

The Salesforce Admin at Lake Tahoe Bank is implementing Financial Services Cloud and wants to roll up customer data at the client and group levels. What functionality can Rollup By Lookup (RBL) provide for this requirement?

- A. Rollups for multiple joint owners are not supported
- B. An RBL rule displays summary calculations of financial account information, such as account balances.
- C. RBL calculations can not be disabled when importing data into your Salesforce org.

- D. When you edit a financial account record or primary Group membership, the Rollup By Lookup(RBL) configuration updates the corresponding RBL summaries at the client and Group levels.
- E. Rollup By Lookup (RBL) displays associated records for Financial Accounts, Financial Goals, and Opportunities.

Answer: B,D,E

Explanation:

The functionality that Rollup By Lookup (RBL) can provide for rolling up customer data at the client and group levels are as follows: An RBL rule displays summary calculations of financial account information, such as account balances, networth, total assets, total liabilities, and so on¹.

When you edit a financial account record or primary group membership, the Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the client and group levels¹.

Rollup By Lookup (RBL) displays associated records for Financial Accounts, Financial Goals, and Opportunities on the client and group pages¹. Verified References: 1

NEW QUESTION # 139

Cumulus Cloud Bank is asking the consultant to explain some tools available to integrate Salesforce into several of its back-end/core systems.

Which three capabilities should a consultant recommend?

- A. Data Consumption Framework
- B. Industry Integration Solutions with the MuleSoft Anypoint Platform
- C. OmniStudio Integration Procedures
- D. Data Processing Engine
- E. OmniStudio DataRaptors

Answer: B,C,E

Explanation:

Salesforce offers various tools and capabilities to integrate Financial Services Cloud with external systems, such as core banking, insurance, or mortgage platforms. Some of the tools and capabilities that a consultant can recommend are:

Industry Integration Solutions with the MuleSoft Anypoint Platform: These are prebuilt integration solutions that leverage the MuleSoft Anypoint Platform to connect Financial Services Cloud with common industry systems, such as Fiserv, FIS, Jack Henry, and Guidewire¹. These solutions enable bi-directional data synchronization, orchestration, and transformation between Salesforce and the external systems².

OmniStudio Integration Procedures: These are reusable components that define the logic and sequence of steps for integrating data from external sources into Financial Services Cloud³. Integration procedures can be triggered by events, such as a button click or a record update, and can invoke other components, such as DataRaptors or OmniScripts⁴.

OmniStudio DataRaptors: These are data transformation components that can extract, load, and manipulate data from various sources, such as Salesforce objects, REST or SOAP web services, or CSV files⁵. DataRaptors can be used to map data between different formats, perform calculations or validations, or create or update records in Financial Services Cloud⁶.

References:

Industry Integration Solutions

MuleSoft Anypoint Platform

OmniStudio Integration Procedures

Create an Integration Procedure

OmniStudio DataRaptors

Create a DataRaptor

NEW QUESTION # 140

Which Salesforce Financial Services Cloud feature enables financial advisors to track and manage client accounts?

- A. Financial accounts management
- B. Performance reporting
- C. Client onboarding
- D. Opportunity management

Answer: A

Explanation:

Financial accounts management is a Salesforce Financial Services Cloud feature that enables financial advisors to track and manage client accounts. A financial account is any account managed by a financial institution, such as a bank, an insurance company, or an investment firm. Financial Services Cloud supports many kinds of financial accounts, such as checking accounts, savings accounts, mortgages, credit cards, investment accounts, insurance policies, and more³. Financial advisors can use Financial Services Cloud to view, create, update, and delete financial accounts for their clients, as well as link them to other objects, such as households, goals, referrals, or opportunities⁴.

References:

Financial Accounts

Manage FinancialAccounts

NEW QUESTION # 141

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