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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q24-Q29):

NEW QUESTION # 24

Lake Tahoe Bank would like to capture their commercial customers in FSC. A commercial customer can be owned by multiple groups. How can Lake Tahoe Bank SF Admin configure FSC to capture and display commercial customer and its parent company ? (3 correct answers)

- A. Leverage Groups to capture the majority owner and Account hierarchy to capture minority owner
- B. Add the Business record type to the Group record type mapper
- C. Capture the majority owner as parent account using Account hierarchy
- D. Enable Relationship Group Hierarchy in Custom Metadata
- E. Link multiple owners to the business entity as a Group

Answer: A,B,E

Explanation:

To capture and display commercial customers and their parent companies, Lake Tahoe Bank SF Admin can use the following steps: Add the Business record type to the Group record type mapper, which is a custom metadata type that defines which record types can be added as members of a group¹.

Leverage Groups to capture the majority owner of a commercial customer, which is a business entity that has a stake in another business entity¹. Groups are a feature that allows users to create and manage household and business relationships¹.

Use Account hierarchy to capture minority owners of a commercial customer, which are business entities that have less than 50% stake in another business entity². Account hierarchy is a feature that allows users to see how accounts are related to each other in a parent-child relationship².

Link multiple owners to the business entity as a Group, which allows users to see all the stakeholders of a commercial customer in one place¹

NEW QUESTION # 25

A financial services company needs to add new values for how a customer can be related to a financial account. Which object/field should the administrator add new values on?

- A. Object: Financial Account Role; Field: Role
- B. Object: Financial Account; Field: Joint Owner
- C. Object: Account-Account Relationship; Field: Related Role
- D. Object: Financial Account; Field: Primary Owner

Answer: A

Explanation:

To add new values for how a customer can be related to a financial account, the administrator should add new values on the Role field of the Financial Account Role object. The Financial Account Role object is a junction object that links a contact or an individual to a financial account and defines their role or relationship with that account. The Role field is a picklist field that specifies the role of the contact or individual for the financial account, such as owner, beneficiary, trustee, or custodian. By adding new values on the Role field of the Financial Account Role object, the administrator can create new categories of financial account relationships for customers.

NEW QUESTION # 26

Lake Tahoe Bank branch manager is asking the Salesforce Administrator for improvements in Salesforce to speed up Loan Approval Processing. The Salesforce Admin is considering using Action Plans. Which 3 process improvements can be delivered using Action Plans?

- A. Action Plans enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.
- B. Action Plans can speed up the collection of a list of documents needed for the loan application
- C. When you create an action plan from a template for a specific target record, items that have no assigned user are assigned to the owner of that "target record."
- D. Action Plans create repeatable tasks and automate the task sequences when executed
- E. Action Plans can automatically schedule the next appointment with the Advisor.

Answer: A,C,D

Explanation:

Action Plans are a feature that allows users to create templates for common client processes, such as loan approval, account opening, or financial review. Action Plans can create repeatable tasks and automate the task sequences when executed. When an action plan is created from a template for a specific target record, such as an account or an opportunity, items that have no assigned user are assigned to the owner of that target record.

Action Plans can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.

NEW QUESTION # 27

A system administrator at a financial services company wants to build a report to show Interest Tags. Which two things should the administrator consider when configuring the report?

- A. To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name.
- B. The user must build a report using the Topics object to view Interest Tags in the report.
- C. When the user defines the custom report type, Tag Categories should be selected as the Primary Object.
- D. When the user defines the custom report type, Topics should be selected as the Primary Object.

Answer: A,D

Explanation:

Interest Tags are a feature of Financial Services Cloud that let users add custom tags to client records to capture client needs, interests, and prospecting opportunities. Some of the things to consider when configuring a report to show Interest Tags are: When the user defines the custom report type, Topics should be selected as the Primary Object. Topics is the standard Salesforce object that stores the Interest Tags data⁴. The user can then add other objects as secondary objects, such as Accounts, Contacts, or Opportunities.

To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name. For example, to show only Interest Tags related to Accounts, the user can add a filter for Entity Type equals Account⁵.

References:

Interest Tags

Build an Interest Tags Report

NEW QUESTION # 28

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. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.
- B. 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.
- C. Create a custom object to track client's financial data
- D. Use Process Builder to create a workflow to summarize data at the Person Account level.

Answer: A

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 # 29

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