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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q149-Q154):

NEW QUESTION # 149
Lake Tahoe Bank needs to conduct periodic reviews with their customers to review credit & debit card usage, review account payables and discuss credit needs. The bank wants to ensure such activities are tracked and exceptions are reported &followed up on in a timely manner. How can Financial Services Cloud support these requirements?

- A. Create an Action Plan Template with associated pre-determined Tasks and automate the periodical creation of Action Plans for customer accounts.
- B. Use Lightning Scheduler to periodically schedule tasks for account owners.
- C. Train account owners to create required tasks periodically and setdue dates for tracking.
- D. Run a nightly process to create tasks and assign them to account owners for follow-ups

Answer: A

Explanation:
As explained in the previous question, Action Plans are a feature that can help users track and manage common client processes. By creating an Action Plan Template with associated pre-determined Tasks, such as reviewing credit & debit card usage, reviewing account payables, and discussing credit needs, users can ensure that these activities are tracked and followed up on in a timely manner. Users can also automate the periodical creation of Action Plans for customer accounts using Process Builder or Apex

triggers.

NEW QUESTION # 150
A wealth advisor is trying to relate a client to their attorney using the Add Contact option on the relationship tree but can't find any reciprocal roles displayed in the related role lookup. What are two reasons for this?

- A. The user should be using the Edit Group button to access reciprocal roles.
- B. The user should be using the Member Relationship button under the Actionable Relationship Center.
- C. Sharing rules have not beenset up for reciprocal roles.
- D. Reciprocal roles have not been created in the org.

Answer: A,D

Explanation:
Reference: Configure Reciprocal Roles - Salesforce
Explanation: Some possible reasons why the user can't find any reciprocal roles displayed in the related role lookup are:
Reciprocal roles have not been created in the org. Reciprocal roles are custom objects that define the possible roles for users who need access to Account or Contact records. For example, a reciprocal role can be Advisor, Client, Specialist, or Decision Maker. Each reciprocal role has an associated access level that determines what data fields theuser can view or edit. To create reciprocal roles, the administrator needs to do the following steps:
From Setup, open Object Manager.
In the Quick Find box, enter Reciprocal Role, and then select Reciprocal Role.
Click Fields & Relationships, and thenselect Role Name.
Click New to create a new picklist value for the Role Name field.
Enter a label and a value for the new role, such as Attorney or Client.
Click Save.
The user should be using the Edit Group button to access reciprocal roles. The Add Contact option on the relationship tree only allows the user to add existing contacts as members of a relationship group, such as a household or a business group. The user cannot specify reciprocal roles for the members using this option. To specify reciprocalroles for the members of a relationship group, the user needs to do the following steps:
Click Edit Group on the relationship group record page.
In the Edit Group window, click Member Relationships.
For each member of the group, select a role from the Rolepicklist and a related role from the Related Role lookup.
Click Save.

NEW QUESTION # 151
What are two language-related limitations of Financial Services Cloud?

- A. Flows are available only in English.
- B. Custom component labels are supported only in English.
- C. Referral record type labels are supported only in English.
- D. Predefined reciprocal roles are available only in English.

Answer: C,D

Explanation:
Predefined reciprocalroles are available only in English and Referral record type labels are supported only in English are two language-related limitations of Financial Services Cloud. Predefined reciprocal roles are the roles that define the relationship between two individual clients or between an individual client and a group.
For example, Spouse, Child, Parent, etc. These roles are not translated into other languages and cannot be edited or deleted.
Referral record type labels are the labels that indicate the type of referral, such as Client Referral or Prospect Referral. These labels are also not translated into other languages and cannot be edited or deleted.References: [Predefined Reciprocal Roles], [Referral Record Type Labels]

NEW QUESTION # 152
Cumulus Cloud Bank must provide its customer service staff with real-time access to customeraccounts, including the ability to view current transactions and balances. As a result, the bank expects a high volume of concurrent users at peak times.

Which option is most suitable?

- A. Use Salesforce ConnecHvith External Objects to expose tables from the bank's core systems, and use the standard user interface (Ul) components to surface the records in Salesforce Lightning Ul.
- B. Use the Data Consumption Framework to connect to the bank'smiddleware.
- C. Embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make calloutsto the core system services.
- D. Use Salesforce Connect with External Objects to expose tables from the bank's core systems, and use custom Lightning web components to surfatKthem in the Salesforce Lightning Ul.

Answer: C

Explanation:
The most suitable option for Cumulus Cloud Bank to provide its customer service staff with real-time access to customer accounts, including the ability to view current transactions and balances, is to embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make callouts to the core system services. This option allows the bank to leveragethe Lightning Platform features and capabilities, such as Lightning web components, Apex, and callouts, to create a seamless and performant integration with their core systems. By using custom Lightning web components, the bank can create custom user interfaces that display the data from the core systems on the Account and Financial Account pages. By using custom Apex, the bank can write code that makes callouts to the core system services using HTTP requests and responses, and handle any authentication, error handling, or data transformation logic.

NEW QUESTION # 153
Agents for an insurance company need to know the current and past weather conditions when creating customer claims. The consultant implements a Flex Card for weather conditions in the console to ensure the agents can access the information. The Flex Card needs to provide fields extracted from a weather API and an account field from Salesforce.
Which method should the consultant use, according to best practices?

- A. Integration Procedure
- B. APEX classes
- C. Streaming API
- D. Data Raptor Extract

Answer: A

Explanation:
Reference: Integration Procedure | Vlocity Developer Docs
Explanation: An Integration Procedure is a feature of Vlocity that allows users to create and execute data integration tasks betweenSalesforce and external systems. An Integration Procedure can perform various operations, such as extract, transform, load, query, or update data from different sources and targets. An Integration Procedure can also invoke other Vlocity features, such as DataRaptors, OmniScripts, or Calculations.
To implement a Flex Card for weather conditions in the console, the consultant should use an Integration Procedure that can do the following steps:
Query the weather API using an HTTP action and pass the accountaddress as a parameter.
Extract the relevant fields from the weather API response, such as temperature, humidity, precipitation, etc.
Query the account field from Salesforce using a DataRaptor Extract action and pass the account ID as a parameter.
Merge the weather API fields and the account field into a single data set using a List Merge action.
Return the data set to the Flex Card using a Return action.

NEW QUESTION # 154
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