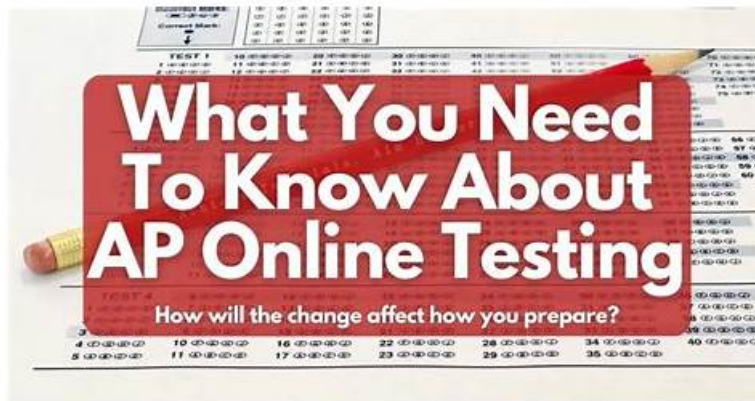


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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q169-Q174):

NEW QUESTION # 169

Planter Farm Credit Union provides loan and insurance products to farmers who operate individually as well as in collaboration with other neighboring farms & farmers. The collaboration can be seasonal or for a limited timeframe. What construct in Financial Services Cloud is most appropriate to represent such collaborative customer business operations?

- A. Standard Household
- **B. Custom Relationship Group**
- C. Account with Record Type = Business
- D. Contact-Contact Relationship

Answer: B

Explanation:

A Custom Relationship Group is a construct in Financial Services Cloud that allows you to model complex and dynamic relationships between clients and accounts. You can use it to represent collaborative customer business operations that aren't captured by standard household or account structures. Verified References: :

Salesforce Financial Services Cloud Implementation Guide, page 67.

NEW QUESTION # 170

A retail bank is using Financial Services Cloud to support its operations. The bank has received complaints that its clients' documentation is often submitted late and when clients call, customer service agents are struggling with multiple systems to determine where the documentation is.

Which solution should a consultant suggest the client explore?

- A. Process Builder to create automatic document requests for missing items
- B. An APEX solution to leverage the SendMail capabilities of Salesforce
- C. A Marketing Cloud integration to manage client communications
- **D. The Send Documents flow for Retail Banking**

Answer: D

Explanation:

The solution that the consultant should suggest the client explore to improve its clients' documentation submission and tracking is the Send Documents flow for Retail Banking. The Send Documents flow for Retail Banking is a prebuilt flow that allows users to send documents requests to clients via email and track the status of the requests in FSC. The flow uses DocuSign eSignature integration to enable clients to sign and return documents electronically. By using the Send Documents flow for Retail Banking, the consultant can help the client streamline and simplify its document management process and improve its customer service agents' efficiency.

NEW QUESTION # 171

A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories.

Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?

- **A. Create a custom picklist on the Financial Account object to track the Type**
- **B. Configure the Financial Account List components for each required category.**
- **C. Create Account lookup fields on the Financial Account object to link the Financial Accounts to an Account.**
- D. Configure Financial Account record types to match the required categories.
- E. Add the Financial Account List component to the Account Lightning record page.

Answer: A,B,C

Explanation:

The following considerations should be included when configuring the report with branch management reportable objects:

Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.

The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial Services Cloud. Banker is an object that represents a banker or an employee who works at a branch unit.

Branch Unit is an object that represents a physical location where bankers provide services to customers.

Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.

When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects.

NEW QUESTION # 172

What steps does the Salesforce Administrator have to take to create a new Business Milestone Type?

- A. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
- B. In the Object Manager go to the Business Milestone object and create a new field using the name of the new milestone.
- **C. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field**
- D. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component

Answer: C

Explanation:

To create a new Business Milestone Type, you need to add a new picklist value on the Milestone Type field of the Business Milestone object. This field is used to categorize the different types of business milestones that can be tracked for a client. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 57.

NEW QUESTION # 173

A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A. Alerts
- B. Engagement Topics
- C. Topics
- D. Interest Tags

Answer: D

Explanation:

The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags. Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION # 174

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