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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q128-Q133):

NEW QUESTION # 128

Which step is required to give a group of users access to a Financial Deal?

- A. Update Industries Settings to give users access to the Financial Deal object.
- **B. Share a financial deal record with a group by adding them as participants to the record from the Financial Deal Participants related list,**
- C. Change organization-wide defaults (OWD) sharing on the Financial Deal object to Public Read/Write.
- D. Create a Financial Deal permission set and assign it to the users that should have access to Financial Deals.

Answer: B

Explanation:

To give a group of users access to a Financial Deal, you need to share a financial deal record with a group by adding them as participants to the record from the Financial Deal Participants related list. The Financial Deal Participants related list is a custom related list on the Financial Deal object that allows you to add users, groups, or queues as participants of a financial deal. Participants can have different roles and access levels for a financial deal, such as Owner, Collaborator, Viewer, or Approver. By adding a group as a participant, you can grant access to all the members of that group for a specific financial deal. Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7]

NEW QUESTION # 129

An insurance company wants to create a car insurance quote process for its website. The process should include the following functionality:

- * The user has to enter contact and address information.
- * The user has to enter the driver's age and the car model and year.
- * The process should calculate an insurance quote based on the data the customer provided and save the offer to the client's record.

Which three OmniStudio tools should the consultant use to design a solution that meets these requirements?

- **A. OmniScripts**
- B. APEX Code
- **C. Business Rules Engine**
- **D. Integration Procedures**
- E. FlexCards

Answer: A,C,D

Explanation:

The following OmniStudio tools should be used to design a solution that meets the requirements for creating a car insurance quote process for the website:

OmniScripts, which are tools that allow users to create guided, interactive, and intuitive scripts that capture data and execute actions. By using OmniScripts, the consultant can create a script that guides the user through the car insurance quote process and captures the contact and address information, the driver's age, and the car model and year.

Integration Procedures, which are tools that allow users to orchestrate data and actions across multiple systems using RESTful APIs. By using Integration Procedures, the consultant can create a procedure that calls the core system service to calculate an insurance quote based on the data provided by the user and returns the quote to the OmniScript.

Business Rules Engine, which is a tool that allows users to define business logic and validation rules using natural language expressions. By using Business Rules Engine, the consultant can create rules that validate the data entered by the user and enforce any business policies or conditions for the car insurance quote process.

NEW QUESTION # 130

Which three objects should a Financial Services Cloud administrator use when planning to use the Mortgage Data Model to integrate with external Loan Origination and Customer Onboarding applications to accurately track the pipeline?

- A. Assets & Liabilities

- B. Account
- C. Opportunity
- D. Financial Account
- E. Case

Answer: B,C,D

Explanation:

The following objects should be used when planning to use the Mortgage Data Model to integrate with external Loan Origination and Customer Onboarding applications to accurately track the pipeline:

Opportunity: An Opportunity is a standard object that represents a potential sale or deal for your products or services. You can use the Opportunity object to track and manage the stages, amounts, probabilities, and expected revenue of your deals. You can also use the Opportunity object to associate products, price books, quotes, contracts, orders, or assets with your deals.

Account: An Account is a standard object that represents a person or an organization that has a business relationship with your company. You can use the Account object to store information about your customers, such as name, address, phone number, website, industry, or rating. You can also use the Account object to associate contacts, opportunities, activities, cases, or notes with your customers.

Financial Account: A Financial Account is a custom object in Financial Services Cloud that represents a financial product or service that is owned by an account holder or related to an account holder's financial goal. You can use the Financial Account object to store information about your customers' financial accounts, such as type, balance, status, or interest rate. You can also use the Financial Account object to associate financial transactions, financial account roles, or financial goals with your customers' financial accounts.

Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7] : Salesforce Help Article [8]

NEW QUESTION # 131

Cumulus Cloud Bank, a major financial services provider, has engaged Salesforce Professional Services to transform its operations with Financial Services Cloud (FSC). The Addams family are wealth management clients with the following relationships:

* The wife and her husband are part of the Addams Household.

The wife is the primary member, and together the couple run the Addams Charitable Trust.

* The wife is also part of the Symonds Household with her father as the primary member. Which tool should the Salesforce FSC consultant recommend so a wealth manager could make sense of this complex data to provide impeccable service to the Addams family and discover new business opportunities?

- A. Actionable Relationship Center (ARC), an advanced visualization engine
- B. Data Visualization with Marketing Cloud Intelligence
- C. Data Filtering and Sorting in Tableau Desktop
- D. Financial Services Cloud Einstein

Answer: A

Explanation:

Actionable Relationship Center (ARC) is a tool that a Salesforce FSC consultant can recommend to a wealth manager who needs to make sense of complex client relationships and discover new business opportunities. ARC is an advanced visualization engine that provides a holistic view of customers and their relationships with actionable insights, all in one place⁵. ARC helps users understand relationships among people and businesses by presenting them in interactive components, such as graphs, cards, lists, and filters⁶. ARC also allows users to perform actions on the customer data, such as creating tasks, sending emails, or updating records⁷.

References:

Actionable Relationship Center (ARC)

Get Started with Actionable Relationship Center

Work with Actionable Relationship Center

NEW QUESTION # 132

Lake Tahoe Bank wants to onboard a client digitally and without asking the client for information that the bank already has on file. The process has multiple steps and can have branching (conditional) logic that asks for different information depending on the responses. Which Salesforce feature should be used for this digital onboarding process?

- A. Financial Goals
- B. Actionable Relationship Center
- C. Action Plans

- **D. Flows**

Answer: D

Explanation:

The Salesforce feature that should be used for the digital onboarding process is Flows. Flows are a tool that can automate business processes and guide users or customers through screens that collect and display information. Flows can have multiple steps and branching logic that ask for different information depending on the responses. Flows can also integrate with existing data and prefillfields with information that the bank already has on file, reducing the need to ask the customer for redundant information. Flows can be embedded in Lightning pages, Experience Cloud sites, mobile apps, or websites to provide a seamless and engaging digital onboarding experience. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 133

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