

Standard Salesforce Financial-Services-Cloud Answers | Financial-Services-Cloud Latest Test Report



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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q23-Q28):

NEW QUESTION # 23

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the client onboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.
- B. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.
- C. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.
- D. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.

Answer: B,D

Explanation:

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION # 24

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

Answer: D

Explanation:

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 # 25

Which two statements are true for a Group in Financial Services Cloud?

- A. A group is a type of account record that people and businesses can be related to through the account contact relationship object.
- B. A group is a type of account record that people and businesses can be related to through the Financial Account relationship object
- C. Financial Services Cloud includes a group record type for households
- D. Financial Services Cloud includes a group record type for businesses

Answer: A,C

NEW QUESTION # 26

Financial Advisors can create a financial goal to track a client's progress toward major purchases, retirement savings, or other life goals. Which statements are correct?

- A. You can't create a goal for paying down a debt.
- B. Financial Goals require the Financial Goals permission set to be visible to a user.
- C. You can only create savings-oriented goals.
- D. You can associate a goal with a specific financial account.

Answer: A,C

NEW QUESTION # 27

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a member's Financial Account Balances are not adding up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

- A. Ensure the Primary Group flag in the Account record is checked
- B. Ensure the reported household is the Primary Group for the member.
- C. Ensure RollupByLookup Configuration is Active.
- D. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.
- E. Ensure that the member is the Primary Member in that Household.

Answer: B,C

NEW QUESTION # 28

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