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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q138-Q143):

### NEW QUESTION # 138

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

**Answer: D**

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 place<sup>5</sup>. ARC helps users understand relationships among people and businesses by presenting them in interactive components, such as graphs, cards, lists, and filters<sup>6</sup>. ARC also allows users to perform actions on the customer data, such as creating tasks, sending emails, or updating records<sup>7</sup>.

References:

Actionable Relationship Center (ARC)

Get Started with Actionable Relationship Center

Work with Actionable Relationship Center

#### NEW QUESTION # 139

Which three things must an admin keep in mind when creating Action Plan Templates<sup>5</sup>

- **A. An Action Plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template.**
- **B. When you create an Action Plan from a template for a specific target record, item deadlines are calculated using the start date and date offset " defined in the Action Plan Template**
- C. The Action Plan Template permission set must be added to all users that want to use Action Plans.
- **D. When you create an Action Plan from a template for a specific target record, the plan creator can choose whether the date calculation is based on calendar or working days.**
- E. When creating Action Plan Templates with the UI, you can designate a plan owner different from the plan creator.

**Answer: A,B,D**

Explanation:

The following things must be kept in mind when creating Action Plan Templates:

When creating Action Plan Templates with the UI, you can designate a plan owner different from the plan creator. The plan owner is the user who is responsible for executing the tasks in the Action Plan. The plan creator is the user who creates the Action Plan Template or the Action Plan from the template. You can assign a different plan owner for each Action Plan Template or Action Plan. An Action Plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template. An Action Plan Template is a reusable blueprint that defines the tasks, owners, and deadlines for a common business processor service request. An Action Plan is a specific implementation of the template that applies to a particular target record, such as an account, contact, or opportunity.

When you create an Action Plan from a template for a specific target record, item deadlines are calculated using the start date and date offset defined in the Action Plan Template. The start date is the date when you create the Action Plan from the template. The date offset is the number of days before or after the start date when each task is due. You can specify different date offsets for each task in the template. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

#### NEW QUESTION # 140

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 that the member is the Primary Member in that Household
- **B. Ensure RollUpByLookup Configuration is Active**
- C. Ensure the Primary Group flag in the Account record is checked.
- **D. Ensure the reported Household is the Primary Group for the member**

- E. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.

**Answer: B,D**

Explanation:

To troubleshoot the issue of Financial Account Balances not adding up to the Financial Summary field in the related Household, the Admin should take the following steps:

Ensure RollUpByLookup Configuration is Active, which is a custom setting that enables or disables the Rollup By Lookup (RBL) feature. RBL is a feature that allows users to aggregate data from financial accounts and display it at the client and group levels<sup>1</sup>.

Ensure the reported Household is the Primary Group for the member, which is a field on the Account object that indicates whether an account is the primary group for a contact or an individual. The primary group determines which financial summary fields are displayed on the contact or individual page<sup>2</sup>. Verified References: 12

#### NEW QUESTION # 141

A consultant is configuring ademo for a customer but cannot create new residential loan application records.

What is prohibiting the consultant from creating a new residential loan application?

- A. The Residential Loan Application flow was not enabled in the setup.
- B. The administrator did not enable "Allow Mortgage Access" in Setup.
- C. The user does not have "Mortgage User" checked in their user record.
- D. The administrator did not assign the Mortgage permission set to the user.

**Answer: D**

Explanation:

The administrator did not assign the Mortgage permission set to the user. The Mortgage permission set is required to access the Residential Loan Application object and its related objects, such as Loan Application Form, Loan Assessment, and Loan Product. Without this permission set, the user cannot create, edit, or view residential loan application records. The administrator can assign the Mortgage permission set to the user from the user detail page in Setup. References: [Mortgage Permission Set], [Residential Loan Application Object]

#### NEW QUESTION # 142

Lake Tahoe Bank, an existing Salesforce customer, is planning to implement Financial Services Cloud. Their Salesforce Admin is considering whether to use a new Salesforce org or upgrade the existing org. Which three of the considerations below indicate that a new Salesforce org is the better choice?

- A. The current implementation is using a product-centric view and the bank wants to move to a customer-centric view.
- B. Existing business capabilities and processes can be redesigned to deliver a higher business impact
- C. Data migration is a big concern. The current org has a large amount of data and the Bank wants to minimize data migration efforts.
- D. The bank has limited redesign opportunities for business capabilities.
- E. The bank wants to use this project as an opportunity to retire customization

**Answer: A,B,E**

Explanation:

The following considerations indicate that a new Salesforce org is the better choice for implementing Financial Services Cloud:

The bank wants to use this project as an opportunity to retire customization. A new org will allow the bank to start fresh and avoid carrying over unnecessary or outdated customization that may conflict with Financial Services Cloud features or best practices.

The current implementation is using a product-centric view and the bank wants to move to a customer-centric view. A new org will allow the bank to adopt the Financial Services Cloud data model, which is designed to provide a holistic view of the customer and their relationships, goals, financial accounts, activities, and interactions.

Existing business capabilities and processes can be redesigned to deliver a higher business impact. A new org will allow the bank to leverage the Financial Services Cloud capabilities, such as Action Plans, Relationship Groups, Rollup By Lookup, Service Processes, etc., to optimize their business processes and enhance their customer experience. Verified References: : Salesforce Help Article 6

#### NEW QUESTION # 143

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