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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q103-Q108):

NEW QUESTION # 103

Cumulus Cloud Bank needs help onboarding new customers. The business process requires updating the Know Your Customer (KYC) document checklist and performing internal tasks in a predefined order.

However, during an internal audit, it was found that bankers often miss these tasks and still move to the next stage of the onboarding process.

What should a consultant recommend?

- A. Utilize Financial Services Cloud flag Templates to flag missing items.
- **B. Utilize Action Plan and Action Plan Template.**
- C. Create an after-save trigger to generate reminder tasks.
- D. Utilize Chatter notifications for reminders.

Answer: B

Explanation:

To help onboarding new customers, the consultant should recommend using Action Plan and Action Plan Template. Action Plan is a feature in Financial Services Cloud that allows you to automate and standardize common business processes or service requests, such as customer onboarding, account opening, or loan origination. You can use Action Plan to create templates that define the tasks, owners, and deadlines for each process or request. You can also use Action Plan to enforce task dependencies and completion criteria, so that bankers cannot skip or miss any tasks or move to the next stage of the onboarding process without meeting the requirements. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 104

Lake Tahoe Bank would like to restrict their Financial Services Cloud users from viewing certain types of milestones that might be irrelevant to their customers or might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

- A. The Salesforce Admin can manage sensitive Life Events using Permission Sets.
- B. The Salesforce Admin can hide the life Event or Business Milestone type, by removing it from the Event Type picklist.
- C. The Salesforce Admin can manage sensitive Life Events using sharing rules.
- **D. The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane.**

Answer: D

Explanation:

The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane. The Life Events component is a Lightning component that displays a timeline of life events and business milestones for a client or a group. The Admin can use the Properties pane to customize the component and select which event types to show or hide on the timeline.

NEW QUESTION # 105

A commercial loan due diligence process is handled by multiple individuals at Lake Tahoe Bank. Lake Tahoe Bank wants an easy way for managers to distribute the work, to understand the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

What FSC feature can Lake Tahoe Bank use to track this process?

- A. Flows
- **B. Action Plans**
- C. Apex Triggers on the task object
- D. Workflow Rules/Process Builder

Answer: B

NEW QUESTION # 106

Not all life events or business milestones apply to every customer. To create a better customer experience, you can hide the life events or business milestones a customer hasn't achieved or is unlikely to achieve in the future. Which of the following statements are correct?

- A. Life Events can not be displayed on the Household level of the Account Record.
- B. The option to hide life event types or business milestone types is not available in the Communities version of the Life Events or Business Milestones component.
- C. It is possible to hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal.
- D. When you hide a life event or business milestone type, it doesn't appear on the component until you add an event or milestone of that type.

Answer: C,D

NEW QUESTION # 107

Users at Lake Bank have been creating multiple events for once in a lifetime event such as birth. What should an Administrator do to prevent users from accidentally creating more than one event of such an event type?

- A. Create a validation rule that will stop the user if they attempt to add multiple one-time events.
- B. Create an Apex trigger that will prevent the saving of multiple one-time events
- C. Remove user's ability to create one-time events
- D. Select the Unique checkbox on the picklist value for the Event Type field on the Person Life Event object

Answer: D

NEW QUESTION # 108

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