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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q106-Q111):

NEW QUESTION # 106

Which three related lists are visible within Actionable Relationship Center associated with the Account object?

- A. Notes and Attachments
- B. Household Financial Accounts
- C. Cases

- D. Financial Holdings
- E. Client Financial Goals

Answer: B,D,E

Explanation:

Explanation

The following related lists are visible within Actionable Relationship Center (ARC) associated with the Account object: Client Financial Goals, which is a related list that displays the financial goals of the account, such as retirement, education, or debt payoff.

Financial Holdings, which is a related list that displays the financial accounts of the account, such as bank accounts, investment accounts, or insurance policies.

Household Financial Accounts, which is a related list that displays the financial accounts of the account's primary group, such as household or business group.

NEW QUESTION # 107

Which three of these statements are true for Rollup By Lookup (RBL) in Financial Services Cloud?

- A. The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels
- B. RBL rules do not require a lot of processing power.
- C. An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.
- D. Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.
- E. Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules

Answer: A,C,E

Explanation:

The following statements are true for Rollup By Lookup (RBL) in Financial Services Cloud:

An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances. You can use RBL rules to aggregate financial account data across different levels of client relationships.

The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels. You can use RBL configuration to define which fields are rolled up and how they are calculated for each diem and group type.

Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules. RBL rules are complex and require extensive testing and validation. If you need to create or customize RBL rules, you should contact a certified Salesforce partner or consultant. Verified Reference: : Salesforce Financial Services Cloud Implementation Guide, page 75. : Salesforce Financial Services Cloud Implementation Guide, page 76. : Salesforce Financial Services Cloud Implementation Guide, page 77.

NEW QUESTION # 108

Where can the multilingual solution search feature be enabled? (2 answers)

- A. Self-service portal
- B. Public knowledge base
- C. Solution tab search
- D. Salesforce content

Answer: A,B

NEW QUESTION # 109

Lake Tahoe Bank is evaluating Financial Services Cloud to help them deliver a customer-centric view. They currently have a heavily customized Salesforce implementation with a product-centric design. Lake Tahoe Bank wants to make sure planned changes have a minimal impact on users during implementation. What is the recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank?

- A. Implement Financial Service Cloud in the existing org (Brow Field).
- B. Implement Financial Service Cloud in a Trial org and convert the Trial org to production org.
- C. Implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org.

- D. Implement Financial Service Cloud in the existing org's Sandbox and then deploy to production org to mitigate the end-user impact

Answer: C

Explanation:

Explanation

The recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank is to implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org. This approach allows Lake Tahoe Bank to leverage the best practices and features of Financial Services Cloud without being constrained by their existing customizations and data model. It also minimizes the impact on users during implementation, as they can continue to use their current system until the new org is ready to go live. A green field implementation requires careful planning, data migration, and change management, but it can result in a more efficient and customer-centric solution. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 8.

NEW QUESTION # 110

A financial services company is migrating a legacy customer relationship management system to Financial Services Cloud (FSC). The company is requesting that its consulting partner introduce specific customer interaction features mapped to its business processes.

What should the consultant consider when introducing the FSC features?

- A. If there is a business process for taking detailed notes for client meetings and adding action items, the Action Plan component is recommended to use.
- B. If there is a business process for tracking the customer life events and milestones, and timely reminding of opportunities, the Action Plan component is recommended to use.
- C. If there is a business process for limiting role-based data visibility, the Interaction Summaries component is recommended to use.
- D. If there is a business process for showing common interests and needs across the company's clients, the Interaction Summaries component is recommended to use.

Answer: A

NEW QUESTION # 111

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If you have classes that may have the same basic structure, Financial-Services-Cloud but will have little or none of the same functionality, consider using interfaces instead of inheritance.

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