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Question 1

Question Type: MultipleChoice

The Lake Tahoe Bank Salesforce Admin is planning to migrate data into the new Financial Services Cloud org. The Admin can control whether Rollup By Lookup (RBL) rules or record rollups are queried and calculated. Before initiating data insert or update operations, the Admin wants to disable rollups to speed up data loading. Where in Salesforce would the Admin temporarily disable rollups to accelerate uploads?

Options:

A) Object Settings

B) Company Settings

C) App Manager

D) Custom Settings

Answer:

D

Question 2

Question Type: MultipleChoice

Lake Tahoe Bank, an existing Salesforce customer, is planning to implement FSC. Their Salesforce Admin is considering whether to use a new Salesforce org for the FSC users, or upgrade the existing org. Which considerations indicate that upgrading the existing Salesforce org is the better choice?

Options:

A) The bank wants to use this project as an opportunity to retire customizations.

B) Data migration is a big concern. The current org has a large amount of data and the bank wants to minimize data migration efforts.

C) The bank is currently using several ISV solutions and re-implementing them would be a big effort.

D) The current implementation is using a product-centric view and the bank wants to move to a customer-centric view.

E) The bank has limited redesign opportunities for business capabilities.

Answer:

B, C, E

Question 3

Question Type: **MultipleChoice**

What 3 options does the FSC application offer to view and update Account-Account, Account-Contact and Contact-Contact Relationships?

Options:

A) Actionable Relationship Center

B) Group Members Component

C) Family Members Component

D) Relationship Map

E) Life Events Component

Answer:

A, B, D

Question 4

Question Type: MultipleChoice

Which three Group Member data points can be rolled up to the Group level?

Options:

A) Loans

B) Financial Goals

C) Approvals

D) Referrals

E) Tasks

Answer:

A, D, E

Question 5

Question Type: MultipleChoice

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?

Options:

A) Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.

B) Ensure the reported household is the Primary Group for the member.

C) Ensure RollupByLookup Configuration is Active.

D) Ensure that the member is the Primary Member in that Household.

E) Ensure the Primary Group flag in the Account record is checked

Answer:

B, C

Question 6

Question Type: **MultipleChoice**

If a client is associated with more than one Household or Group, where will this client's records get rolled up to?

Options:

A) To the household selected by the advisor for record rollups.

B) To the Household where the client is the primary member.

C) To the household with the client's primary address.

D) To all the parent households and groups

Answer:

B

Question 7

Question Type: MultipleChoice

What 3 functionalities are supported by the Relationship Map and Group Builder?

The Relationship Map and Group Builder allows the user to:

Options:

A) define the Primary Group for a Member.

B) display Financial Holdings.

C) define what data is being rolled up to the Household.

D) enable or disable Enable Rollup Summary calculations.

E) define the Role of the Members of the Household

Answer:

A, C, E

Question 8

Question Type: **MultipleChoice**

The Salesforce Admin at Lake Tahoe Bank is implementing Financial Services Cloud and wants to rollup financial data at the client and group levels? What functionality can Rollup By Lookup (RBL) provide for this requirement?

Options:

A) Rollup By Lookup (RBL) displays associated records for Financial Accounts, Financial Goals and Opportunities.

B) Rollups for multiple joint owners are not supported.

C) When you edit a financial account record or primary Group membership, the Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the client and Group levels.

D) An RBL rule displays summary calculations of financial account information, such as account balances.

E) RBL calculations can't be disabled when importing data into your Salesforce org.

Answer:

A, C, D

Question 9

Question Type: **MultipleChoice**

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

Options:

A) Rollup By Lookup (RBL) do not require a lot of processing power.

B) Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.

C) An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.

D) The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the client and group levels.

E) Salesforce does not recommend or provide support for creation or customization of FSC RBL rules.

Answer:

B, C, E

Question 10

Question Type: MultipleChoice

Which 3 out of the box capabilities come with FSC Lead & Referral management?

Options:

A) Accepting a Referral

B) Assigning a Referral

C) Round Robin Referral Routing

D) Referral Automated Approvals

E) Referral Conversion

Answer:

A, B, E

Question 11

Question Type: **MultipleChoice**

What benefits do Flows for FSC offer to support customer onboarding?

Options:

A) Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.

B) Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary without the need to navigate to different screens.

C) Flows enable customers to schedule appointment via customer communities, mobile apps, or websites.

D) Flows enable customers to schedule appointments via customer communities, mobile apps, or websites.

E) Flows enable customers to book appointments with the right specialist at the right time and place through self-service scheduling

Answer:

B

Question 12

Question Type: **MultipleChoice**

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce FSC.

When is the Referral Score updated?

Options:

A) The Referral Score updated when a lead is created using the referral record type.

B) The Referral Score updated when an opportunity associated with the Referral is Closed Won.

C) The Referral Score updated when a referral is converted to an Opportunity or closed.

D) The Referral Score updated when a referral is assigned from the queue to a user.

Answer:

C