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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q160-Q165):

NEW QUESTION # 160

A financial services company wants to plan ahead for designing the Financial Services Cloud (FSC) implementation. Which three activities should the implementation team prioritize during planning?

- A. Prepare for integrations with transactional systems, external data sources, custodians, and any other platforms that the company's business relies on.
- B. Enable and configure person accounts in FSC, and assign users with permission set licenses.
- C. Beyond the preconfigured settings, evaluate whether they need advanced customizations.
- D. Design the modifications to fields, picklists, layouts, and othKrequired features to support business processes.
- E. Review the out-of-the-box capabilities and compare them to the company's current needs.

Answer: A,C,E

Explanation:

The following activities should be prioritized by the implementation team during planning for designing the Financial Services Cloud implementation:

Prepare for integrations with transactional systems, external data sources, custodians, and any other platforms that the company's business relies on. Integrations are the connections or interactions that allow data or functionality to flow between different systems or platforms. You should prepare for integrations with your existing or new systems or platforms that support your business processes, such as transactional systems, external data sources, custodians, or other platforms. You should also consider the integration methods, tools, requirements, and challenges that you will need to address during the implementation.

Beyond the preconfigured settings, evaluate whether they need advanced customizations. Customizations are the changes or modifications that you make to Salesforce to meet your specific business needs or preferences.

You should evaluate whether you need advanced customizations beyond the preconfigured settings that Financial Services Cloud provides out of the box, such as custom objects, fields, formulas, validation rules, workflows, triggers, or components. You should also consider the impact, benefits, and risks of your customizations on your data model, user interface, performance, security, or maintenance.

Review the out-of-the-box capabilities and compare them to the company's current needs. Out-of-the-box capabilities are the features or functions that Financial Services Cloud offers without any customizations or configurations. You should review the out-of-the-box capabilities and compare them to your company's current needs and expectations. You should also identify any gaps or opportunities for improvement that you can address with configurations or customizations during the implementation.

Verified References: :

Salesforce Help Article [12] : Salesforce Help Article [13] : Salesforce Help Article [14]

NEW QUESTION # 161

A financial services company has found that more than two-thirds of customer onboarding processes are manually done by client specialists, consuming large amounts of time and resulting in errors in the sales process. The company contacts a consultant to learn how to leverage Financial Services Cloud features to improve the current state.

What should the consultant consider from a customer onboarding perspective?

- A. If the company struggles with the low efficiency of tracking required documents for its customers and creating templates for checklists, Action Plan is recommended to improve the current state.
- B. If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies, Action Plan can be used to improve the current state.
- C. If the company struggles with the low efficiency of collecting data in questionnaires and meeting compliance with the company policies, Discovery Framework can be used to improve the current state.
- D. If the company struggles with the low efficiency

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