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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q31-Q36):

NEW QUESTION # 31

Cumulus Bank's mortgage department is currently using spreadsheets to gather client data for mortgage applications. The bank is interested in improving the efficiency of this process.

Which two features should a consultant suggest to Cumulus Bank to implement?

- A. Flow Builder to automate these business processes
- B. A Mortgage Application' custom object to hold the collected client data
- C. Data Import Wizard to upload the data collected in spreadsheets
- D. The standard mortgage flow templates to build a mortgage flow in Financial Services Cloud

Answer: A,D

Explanation:

Salesforce provides features and tools to help financial institutions improve the efficiency of their mortgage processes and provide better experiences for their customers. Some of the features and tools that a consultant can suggest to Cumulus Bank to implement are:

The standard mortgage flow templates to build a mortgage flow in Financial Services Cloud: These are prebuilt flow templates that guide users through the steps of creating a mortgage application, capturing borrower information, and submitting the application for approval⁷. The templates can be customized to suit the bank's specific needs and requirements⁸.

Flow Builder to automate these business processes: Flow Builder is a point-and-click tool that lets users create flows to automate business processes in Salesforce⁹. Flow Builder can be used to create custom mortgage flows that integrate with other Salesforce features, such as data models, objects, fields, validation rules, and actions¹⁰.

References:

Flow Builder for Mortgage

Customize Mortgage Flows

Flow Builder

Create a Mortgage Flow

NEW QUESTION # 32

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m058 Which Financial Services Cloud object should a consultant recommend?

- A. Received Document
- **B. Identification Document**
- C. Identity Document
- D. Document Checklist Item

Answer: B

Explanation:

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

NEW QUESTION # 33

Lake Tahoe Bank is rolling out Financial Services Cloud and the VP of IT is concerned about the cost of the licenses. The System Admin recommends using restricted licenses for users that need only limited access to Financial Service Cloud features. Which Financial Services Cloud permission set license enables user access to a license with contractual restrictions for Financial Services Cloud and can be used to grant restricted access to users like Bank Tellers?

- A. Financial Service Cloud Extension
- B. Financial Services Cloud Standard
- **C. Financial Service Cloud Basic**
- D. Client Segmentation

Answer: C

Explanation:

To grant restricted access to users like Bank Tellers who need only limited access to Financial Services Cloud features, the Admin can use Financial Service Cloud Basic permission set license. This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL).

NEW QUESTION # 34

A financial services company would like its users to be able to relate two business accounts. What should the administrator configure to meet the requirement?

- A. Create a new Contact Reciprocal Role for the required value.
- B. Create a new Account Reciprocal Role for the required value.
- C. Update the Role picklist on the Account-Contact Relationship object with new value.
- **D. Update the Role picklist on the Account-Account Relationship object with new value.**

Answer: D

Explanation:

To configure Financial Services Cloud to allow users to relate two business accounts, the administrator should update the Role picklist on the Account-Account Relationship object with new value. The Role picklist is a field on the Account-Account Relationship object that defines the type of relationship between two accounts, such as Household Member, Business Owner, Trustee, or Friend. The Role picklist is used to filter and display the account-account relationships in the Actionable Relationship Center (ARC). To update the Role picklist, you need to go to Setup > Object Manager > Account-Account Relationship > Fields & Relationships > Role and add or remove values according to your business needs. Verified References: : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 35

Which 3 options does the Financial Services Cloud application offer to view and update Account-Account, Account-Contact, and Contact-Contact Relationships?

- **A. Actionable Relationship Center**
- B. Family Members Component
- **C. Relationship Map**
- **D. Group Members Component**
- E. Life Events Component

Answer: A,C,D

Explanation:

The following options are available to view and update Account-Account, Account-Contact, and Contact-Contact Relationships in Financial Services Cloud:

Actionable Relationship Center: This is a Lightning component that displays a list of all the relationships for a client or a group. You can use it to view, create, edit, and delete relationships.

Relationship Map: This is a Lightning component that displays a graphical representation of all the relationships for a client or a group. You can use it to visualize and navigate the relationship network.

Group Members Component: This is a Lightning component that displays a list of all the members of a group.

You can use it to view, add, and remove group members. Verified References: : Salesforce Financial Services Cloud User Guide, page 34. : Salesforce Financial Services Cloud User Guide, page 36. : Salesforce Financial Services Cloud User Guide, page 38.

NEW QUESTION # 36

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