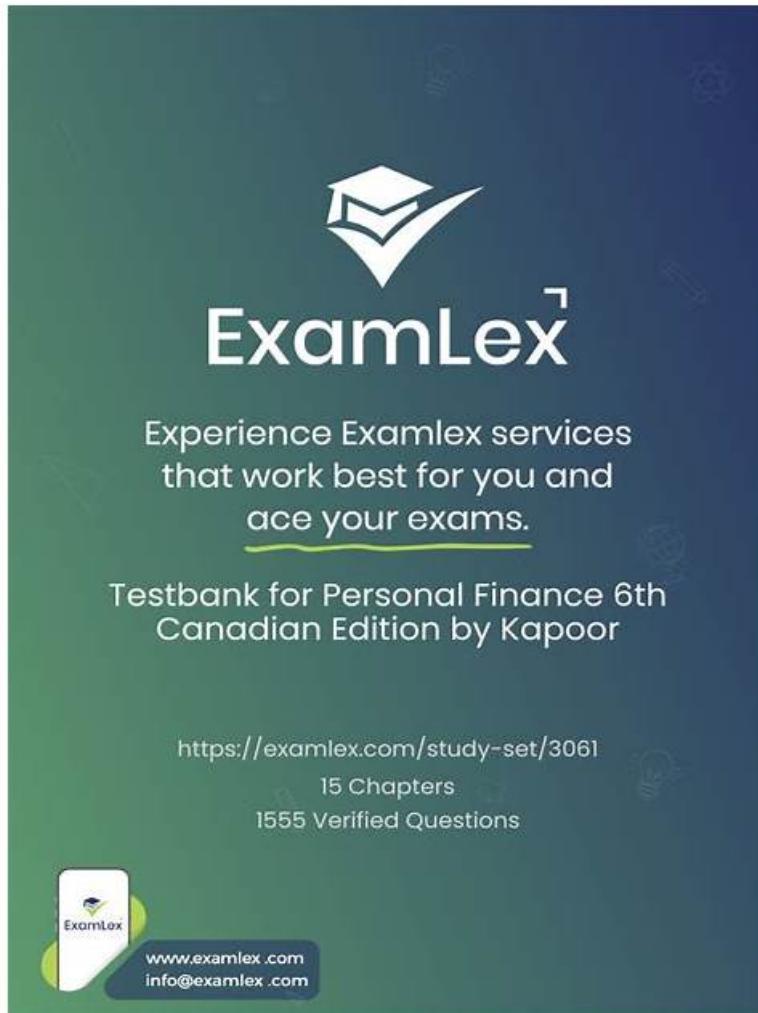


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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q11-Q16):

NEW QUESTION # 11

Which of these statements is not correct about the visibility of Action Plan Tasks?

- A. Users will be able to see the Action Plan tasks assigned to them through the standard Salesforce task lists.
- B. Once the Action Plan is assigned, you can see the related Tasks on the Timeline
- **C. Users will be able to see the Action Plan tasks on the related list of the Account page layout.**
- D. The user can see tasks on the homepage if the Task Card is applied to the homepage.

Answer: C

NEW QUESTION # 12

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

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 Reference: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 13

What can be transferred from one user to another user during mass transfer of account records? (3 answers)

- **A. Open cases**
- B. Closed activities
- **C. Closed cases**
- D. Related custom object records
- **E. Open activities**

Answer: A,C,E

NEW QUESTION # 14

How do you give users access to use Financial Services Cloud?

- **A. Assign a Salesforce License, Financial Services Cloud Permission Set License, and the applicable Permission Sets**
- B. Assign a Salesforce License and select the right profile
- C. Every user automatically gets access to the full features of Financial Services Cloud when you install the package
- D. Assign a Salesforce License and the Financial Services Cloud Permission Set License

Answer: A

NEW QUESTION # 15

Which three types of Account-Account relationships are displayed in the Actionable Relationship Center?

- A. Accounts & Groups
- B. Accounts & Peers
- C. Accounts & Businesses
- D. Accounts & Members

Answer: A,B,C

Explanation:

The following types of Account-Account relationships are displayed in the Actionable Relationship Center (ARC):

Accounts & Businesses: This type of relationship shows the accounts that are related to a business account, such as owners, partners, or beneficiaries. You can use this type of relationship to understand the ownership structure and financial interests of a business account.

Accounts & Peers: This type of relationship shows the accounts that are related to another account by a peer- to-peer relationship, such as friends, colleagues, or associates. You can use this type of relationship to identify potential referrals and cross-selling opportunities from an account's network.

Accounts & Groups: This type of relationship shows the accounts that are related to a group account, such as household members, trust members, or business group members. You can use this type of relationship to view the aggregated financial data and activities of a group account. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 16

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