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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q37-Q42):

NEW QUESTION # 37

Cumulus Cloud Bank, a major financial services provider, has engaged Salesforce Professional Services to transform its operations with Financial Services Cloud (FSC). The Addams family are wealth management clients with the following relationships:

* The wife and her husband are part of the Addams Household.

The wife is the primary member, and together the couple run the Addams Charitable Trust.

* The wife is also part of the Symonds Household with her father as the primary member. Which tool should the Salesforce FSC consultant recommend so a wealth manager could make sense of this complex data to provide impeccable service to the Addams family and discover new business opportunities?

- A. Data Visualization with Marketing Cloud Intelligence
- B. Data Filtering and Sorting in Tableau Desktop
- C. Actionable Relationship Center (ARC), an advanced visualization engine

- D. Financial Services Cloud Einstein

Answer: C

Explanation:

Actionable Relationship Center (ARC) is a tool that a Salesforce FSC consultant can recommend to a wealth manager who needs to make sense of complex client relationships and discover new business opportunities. ARC is an advanced visualization engine that provides a holistic view of customers and their relationships with actionable insights, all in one place⁵. ARC helps users understand relationships among people and businesses by presenting them in interactive components, such as graphs, cards, lists, and filters⁶. ARC also allows users to perform actions on the customer data, such as creating tasks, sending emails, or updating records⁷.

References:

Actionable Relationship Center (ARC)

Get Started with Actionable Relationship Center

Work with Actionable Relationship Center

NEW QUESTION # 38

During a project's design phase, a consultant must provide a Financial Services Cloud solution that can support Compliant Data Sharing (CDS). What are three things the consultant should consider regarding CDS?

- A. Participant Roles provide another way to grant data access without overwriting sharing behavior from existing sharing features.
- B. Role Hierarchy-based sharing is disabled by default in CDS.
- C. Compliance managers and Salesforce administrators can enable CDS for Account and Opportunity objects.
- D. A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories. Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?
- E. In a standard Salesforce org, Role Hierarchy for Account and Opportunity objects is enabled by default and can't be turned off.

Answer: A,B,C

Explanation:

Reference: Compliant Data Sharing in Financial Services Cloud | Salesforce Trailhead Explanation: Compliant Data Sharing (CDS) is a feature of Financial Services Cloud that allows granular control over access to sensitive data in Account and Opportunity objects. CDS can help financial services companies comply with regulations and policies that restrict data visibility based on user roles. Some considerations regarding CDS are:

Participant Roles provide another way to grant data access without overwriting sharing behavior from existing sharing features.

Participant Roles are custom objects that define the possible roles for users who need access to Account or Opportunity records.

For example, a Participant Role can be Advisor, Client, Specialist, or Decision Maker. Each Participant Role has an associated access level that determines what data fields the user can view or edit. For example, an Advisor can have full access to all fields, while a Client can have read-only access to some fields.

Compliance managers and Salesforce administrators can enable CDS for Account and Opportunity objects.

CDS is not enabled by default in Financial Services Cloud. To enable CDS, compliance managers or administrators need to create an integration definition record for each object that they want to enable CDS for.

An integration definition record specifies the object name, the field name that contains sensitive data (such as Notes), the field name that contains the record owner (such as OwnerId), and the field name that contains the record type (such as RecordTypeId).

Role Hierarchy-based sharing is disabled by default in CDS. Role Hierarchy is a feature of Salesforce that allows users to inherit access to records from their managers or peers in the role hierarchy. For example, if a user has access to an Account record, their manager also has access to that record by default. However, in CDS, role hierarchy-based sharing is disabled by default for Account and Opportunity objects. This means that users do not inherit access to records from their role hierarchy unless they are explicitly granted access through Participant Roles or other sharing features.

NEW QUESTION # 39

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Use Process Builder to create a workflow to summarize data at the Person Account level.

- B. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.
- C. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- D. Create a custom object to track client's financial data

Answer: B

Explanation:

A Primary Group is a construct in FinancialServices Cloud that allows you to define the main group for a client. You can use Primary Group to roll up financial data from all the financial accounts that are related to the client or the group. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION # 40

During the design phase of a project, a consultant needs to provide a Financial Services Cloud (FSC) solution for a business requirement that forces a customer to answer a number of assessment questions to complete the onboarding process. What are three things to consider regarding Discovery Framework?

- A. FSC Discovery Framework allows archiving questions.
- B. Discovery Framework can create both standard and hierarchical questions.
- C. Discovery Framework forms cannot be deployed to Communities,
- D. Discovery Framework creates highly capable forms with integrations and advanced logic.
- E. Discovery Framework is built based on Salesforce Flow.

Answer: A,B,D

Explanation:

Discovery Framework is a scalable assessment framework that financial institutions use to gather and evaluate customer information through digital and human channels. Some of the things to consider regarding Discovery Framework are:

Discovery Framework creates highly capable forms with integrations and advanced logic. The forms can be customized with various types of questions, validations, calculations, branching, and integrations with external systems¹.

Discovery Framework can create both standard and hierarchical questions. Standard questions are single-level questions that can be grouped into sections. Hierarchical questions are multi-level questions that can have subquestions based on the answer to the parent question².

FSC Discovery Framework allows archiving questions. Archiving a question removes it from the active question pool and prevents it from being added to new forms. Archived questions can be restored if needed³.

References:

Discovery Framework

Create Questions for Discovery Framework

Archive Questions for Discovery Framework

NEW QUESTION # 41

Which three record type options should an advisor configure for a Lead object configuration?

- A. General
- B. Adjustments
- C. Opportunity
- D. Referral
- E. Retirement Planning

Answer: A,D,E

Explanation:

Reference: Financial Services Cloud - Account and Contact Record Types | Salesforce Help Explanation: Record types are a way to categorize records in Salesforce based on different business processes or requirements. Record types can have different page layouts, picklist values, and business logic. For the Lead object, a financial services company can create different record types to capture different types of leads based on their source, interest, or qualification. Some examples of record types for the Lead object are:

Referral: This record type can be used to capture leads that are referred by existing clients or partners.

Referral leads can have fields such as Referrer Name, Referrer Account, and Referral Type to track the source and nature of the referral.

General: This record type can be used to capture leads that are generated from general marketing campaigns or events. General leads can have fields such as Campaign Name, Campaign Source, and Lead Score to track the effectiveness and potential of the marketing efforts.

Retirement Planning: This record type can be used to capture leads that are interested in retirement planning services or products. Retirement planning leads can have fields such as Retirement Age, Retirement Goal, and Current Savings to assess the needs and suitability of the leads.

NEW QUESTION # 42

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