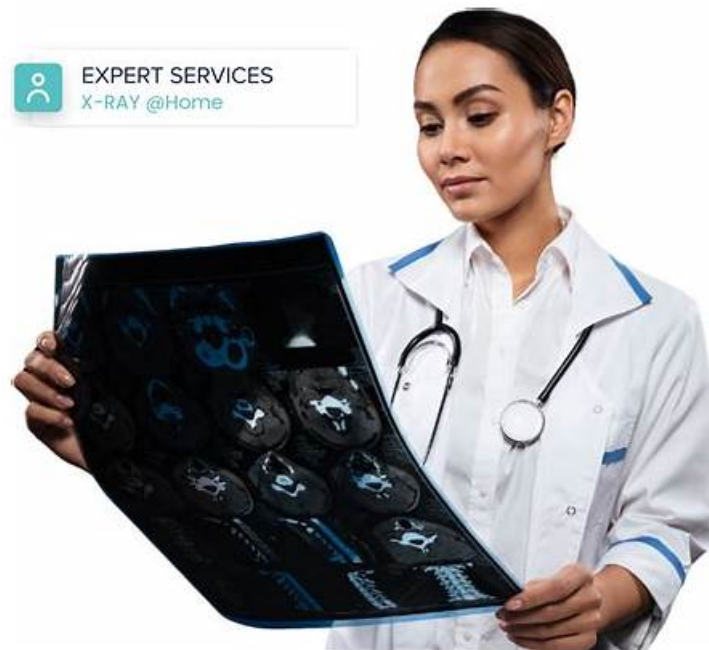


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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q46-Q51):

NEW QUESTION # 46

The ActionableRelationship Center (ARC) is using the Association Type picklist to control the account- account relationships. Which three of the following names are Association Type picklist field values?

- A. Family
- B. Trust
- C. Peer
- D. Member
- E. Group

Answer: A,B,C

Explanation:

The following names are Association Type picklist field values:

Trust, which is a value that indicates that the accounts are related through a trust relationship.

Family, which is a value that indicates that the accounts are related through a family relationship.

Peer, which is a value that indicates that the accounts are related through a peer relationship.

NEW QUESTION # 47

A wealth advisor is trying to relate a client to their attorney using the Add Contact option on the relationship tree but can't find any reciprocal roles displayed in the related role lookup. What are two reasons for this?

- A. The user should be using the Edit Group button to access reciprocal roles.
- B. Sharing rules have not been set up for reciprocal roles.
- C. The user should be using the Member Relationship button under the Actionable Relationship Center.
- D. Reciprocal roles have not been created in the org.

Answer: A,D

Explanation:

Reference: Configure Reciprocal Roles - Salesforce

Explanation: Some possible reasons why the user can't find any reciprocal roles displayed in the related role lookup are:

Reciprocal roles have not been created in the org. Reciprocal roles are custom objects that define the possible roles for users who need access to Account or Contact records. For example, a reciprocal role can be Advisor, Client, Specialist, or Decision Maker. Each reciprocal role has an associated access level that determines what data fields the user can view or edit. To create reciprocal roles, the administrator needs to do the following steps:

From Setup, open Object Manager.

In the Quick Find box, enter Reciprocal Role, and then select Reciprocal Role.

Click Fields & Relationships, and then select Role Name.

Click New to create a new picklist value for the Role Name field.

Enter a label and a value for the new role, such as Attorney or Client.

Click Save.

The user should be using the Edit Group button to access reciprocal roles. The Add Contact option on the relationship tree only allows the user to add existing contacts as members of a relationship group, such as a household or a business group. The user cannot specify reciprocal roles for the members using this option. To specify reciprocal roles for the members of a relationship group, the user needs to do the following steps:

Click Edit Group on the relationship group record page.

In the Edit Group window, click Member Relationships.

For each member of the group, select a role from the Role picklist and a related role from the Related Role lookup.

Click Save.

NEW QUESTION # 48

How are identification documents, other assets, liabilities, goals, and revenue modeled, in an existing Financial Services Cloud org using the individual account model?

- A. Assuming there are no other issues, what should happen when the administrator uploads the import file? The Attachment object is used to represent other assets, liabilities, and goals. In the individual model, these attachments are related to the Account object.
- B. Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the Account object.
- C. An administrator is logged in to Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.
- D. Document, Note, and Attachment objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the person account.

Answer: A

Explanation:

In an existing Financial Services Cloud org using the individual account model, custom objects are used to represent other assets,

liabilities, and goals. These objects are related to the Account object via lookup relationships. For example:

The Other Asset object is used to represent non-financial assets owned by an account holder, such as real estate properties, vehicles, or jewelry.

The Other Liability object is used to represent non-financial liabilities owed by an account holder, such as mortgages, loans, or taxes.

The Financial Goal object is used to represent financial objectives pursued by an account holder, such as retirement planning, education funding, or debt reduction. Verified References:

1: Salesforce Help Article [10]

2: Salesforce Help Article [11]

3: Salesforce Help Article [12]

NEW QUESTION # 49

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify a published Action Plan to support an additional task she needs in order to complete an annual review for a client. How should Jen do this?

- A. Use the 'task creator' tool to create a new task and associate with the existing Action Plan
- **B. Use the Action Plan item feature to add an additional task to a published Action Plan.**
- C. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.
- D. Create an independent Task not related to original Action Plan

Answer: B

Explanation:

To modify a published Action Plan to support an additional task, Jen should use the Action Plan item feature to add an additional task to the published Action Plan. An Action Plan item is a construct in Financial Services Cloud that allows you to add, edit, or delete tasks in an existing Action Plan. You can use Action Plan items to customize your Action Plans according to your specific needs and preferences. Verified References: : Salesforce Help Article 1

NEW QUESTION # 50

A Bank of the Future customer calls the bank to update the address on their account. The call center agent handling the call needs to enter a new address into the system. The agent enters the new contact information using an OmniScript and then needs to generate a prefilled PDF with the new address that can be shared with the customer.

Which two OmniStudio tools should a consultant recommend to generate the prefilled PDF?

- A. Calculation Procedure
- **B. OmniStudio Action Document Generation**
- C. Integration Procedure
- **D. DataRaptor**

Answer: B,D

Explanation:

The following OmniStudio tools should be recommended to generate the prefilled PDF:

OmniStudio Action Document Generation, which is a tool that allows users to create documents from templates and data sources using OmniScripts and Integration Procedures. By using OmniStudio Action Document Generation, the consultant can create a document template with placeholders for the contact and address information and generate a PDF file from it using an OmniScript. DataRaptor, which is a tool that allows users to extract and transform data from Salesforce or external systems using Integration Procedures. By using DataRaptor, the consultant can create a data source that retrieves the contact and address information from Salesforce and maps it to the document template placeholders.

NEW QUESTION # 51

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