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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q27-Q32):

NEW QUESTION # 27

The Salesforce Administrator at Lake Tahoe Bank is asked to make modifications to the Salesforce org to allow for more than one person being joint owners on a Financial Account. What will be the recommended approach to model this requirement?

- **A. Map additional owners using the Financial Account Role.**
- B. Create lookup fields on the Financial Account object to support additional owners
- C. Map additional owners using the Actionable Relationship Center.
- D. Map the primary owner and one joint owner to the Financial Account, because FSC, supports only two joint account owners.

Answer: A

NEW QUESTION # 28

A consultant is working with a new customer and has gained a firm understanding of their business processes and systems in preparation for implementing Salesforce Financial Services Cloud.

What should the consultant create as a deliverable for the current state business process?

- **A. An end-to-end visual map of the process using personas, systems, inputs, and outcomes**
- B. Word document telling the story of the process from the user's perspective
- C. A Powerpoint deck with screenshots of the current systems and callouts to what is happening on each slide
- D. An Excel spreadsheet with steps of the process as rows, and systems and personas in columns

Answer: A

Explanation:

To document the current state business process for implementing Salesforce Financial Services Cloud, the consultant should create an end-to-end visual map of the process using personas, systems, inputs, and outcomes. A visual map is a tool that can help illustrate the flow of a business process from start to finish, showing the steps, decisions, and dependencies involved in each stage. A visual map can also include personas, systems, inputs, and outcomes to provide more context and detail for each step of the process. Personas are fictional characters that represent the different roles or users that participate in or interact with the process. Systems are the tools or applications that are used to perform or support the process. Inputs are the data or information that are required or provided for each step of the process. Outcomes are the results or outputs that are achieved or delivered by each step of the process. Verified Reference: : Salesforce Help Article 3 : Salesforce Help Article [4]

NEW QUESTION # 29

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

Answer: B,D,E

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

NEW QUESTION # 30

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

Answer: B,C

NEW QUESTION # 31

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. Create an independent Task not related to original Action Plan
- C. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.
- **D. Use the Action Plan item feature to add an additional task to a published Action Plan.**

Answer: D

NEW QUESTION # 32

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