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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q66-Q71):

NEW QUESTION # 66

How can knowledge articles be used? (2 answers)

- A. To display for customer self-service
- B. To display Salesforce answers
- C. To resolve customer cases
- D. To display Salesforce solutions

Answer: A,C

NEW QUESTION # 67

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 Reference: : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 68

A banking client currently manages its onboarding process manually with paper forms. To optimize the process, the client wants to digitize and automate as much as possible. The bank wants its clients to manage the forms in a portal and leverage e-signatures for processing.

Which three steps are needed to document this requirement following the discovery session?

- A. Determine the best e-signature solution to use.
- B. Document the business process flows.
- C. Create a visual flow diagram.
- D. Understand the journey for the multiple personas involved in the process.
- E. Design the solution using the Financial Services Cloud components.

Answer: A,B,D

Explanation:

Explanation

The following steps are needed to document the requirement for digitizing and automating the customer onboarding process following the discovery session:

Document the business process flows. You need to document the current and future state of the business process flows for customer onboarding, such as the steps, inputs, outputs, decisions, and dependencies involved in each flow. You can use tools such as diagrams, charts, or tables to illustrate the process flows and identify the pain points, gaps, or opportunities for improvement.

Understand the journey for the multiple personas involved in the process. You need to understand the journey for each persona that participates in or interacts with the customer onboarding process, such as the customer, the client specialist, or the manager. You can use tools such as personas, journey maps, or user stories to capture the needs, goals, pain points, and expectations of each persona and how they experience the process from their perspective.

Determine the best e-signature solution to use. You need to determine the best e-signature solution to use for collecting and processing digital signatures from customers during the onboarding process. You can use tools such as research, analysis, or comparison to evaluate different e-signature solutions based on criteria such as functionality, compatibility, security, cost, or user feedback. Verified References: :

Salesforce Help Article [11] : Salesforce Help Article [12] : Salesforce Help Article [13]

NEW QUESTION # 69

The Salesforce Admin of Lake Tahoe Bank wants to implement Financial Services Cloud using the individual object model. What are the steps to disable person accounts? (Choose Three)

- A. Assign the Person Account record type to the user profiles.
- B. Remove Person Account record types from the Individual Record Type Mapper.
- C. Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
- D. Disable the Person Account custom setting.
- E. Assign the Individual record type to the user profiles.

Answer: B,C,E

Explanation:

The following steps are required to disable Person Accounts and use the Individual object model in Financial Services Cloud: Log a case with Salesforce to perform the conversion from Person Accounts to the individual model. You need to contact Salesforce Support to request the conversion from Person Accounts to the individual model.

This is an irreversible process that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before requesting the conversion in production.

Remove Person Account record types from the Individual Record Type Mapper. You need to remove any Person Account record types that are mapped to Individual record types in the Individual Record Type Mapper. This is a custom setting that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. You can access this setting by going to Setup > Financial Services Settings > Individual Record Type Mapper.

Assign the Individual record type to the user profiles. You need to assign the Individual record type to the user profiles that need to create or access Individual records. The Individual record type is a standard record type on the Account object that represents an individual person who is not directly related to your business, such as a prospect, influencer, or household member. You can assign record types by going to Setup > Profiles > Object Settings > Accounts > Record Types. Verified References: : Salesforce Help Article 5 :

Salesforce Help Article 6 : Salesforce Help Article 7

NEW QUESTION # 70

Lake Tahoe Bank is implementing Financial Services Cloud. The bank's new business processes require that Financial Advisors can add individuals to more than one Group or Household using Multiple Relationship Groups. Where do Admins enable Multiple Relationship Groups?

- A. Object Settings
- B. Lightning Page Editor
- C. Custom Settings
- D. Profiles

Answer: C

Explanation:

To enable Multiple Relationship Groups, which is a feature that allows users to add individuals to more than one group or household, the Admin needs to use Custom Settings. Custom Settings are similar to custom objects and enable application developers to create custom sets of data, as well as create and associate custom data for an organization, profile, or specific user. The Admin can use Custom Settings to enable Multiple Relationship Groups by following these steps:

From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.

Click Manage next to Group Member Record Type Mapper.

Click Edit next to Default Organization Level Value.

In Multiple Relationship Groups Enabled, select True.

Click Save.

NEW QUESTION # 71

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