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Salesforce Financial-Services-Cloud

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Topic Break Down

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QUESTION NO: 1

A bank is loading Financial Account data from a core banking system into Financial Services Cloud. Which three practices should the Data Architect use to support reliable ongoing synchronization?

A. Store the core banking identifier in an External ID field.

B. Use upsert operations for recurring loads.

C. Test mappings and processing in a sandbox before production deployment.

D. Use Salesforce record IDs as the authoritative identifier in the core banking system.

E. Disable all duplicate rules permanently before each load.

ANSWER: A B C

Explanation:

External ID fields, **upsert operations**, and **sandbox testing** are appropriate practices for a reliable integration design. An external ID stores the stable identifier used by the source system, enabling Salesforce and the integration process to identify the corresponding target record. Upsert operations use that identifier to create a record when it does not exist and update it when it does, reducing duplicate-record risk during recurring loads.

Testing mappings, volume, error handling, automation, and record relationships in a sandbox before production deployment is also essential for financial data integrations. The integration should not use Salesforce record IDs as the source system's long-term identifier because those IDs are Salesforce-specific and can differ between environments. Salesforce documents external IDs and upsert processing in the SOAP API Developer Guide and provides architectural guidance in Integration Patterns.

QUESTION NO: 2

Which two statements are true about Group Membership in Financial Services Cloud?

A. Group Membership defines the role of the member within the Group.

B. With Group Membership settings you can define if a Group is the member's primaryGroup.

C. With Group Membership settings you can define who is the primary and who is the secondary member within the Group.

D. Group Membership is modeled using the Account-Group Relationship object.

ANSWER: A B

Explanation:

Group Membership in Financial Services Cloud records how an individual member is associated with a group, such as a household or business group. "Group Membership defines the role of the member within the Group." is correct because the membership record captures the member's role in that group. This role provides the business context for the relationship, for example identifying a person as an owner, beneficiary, trustee, or another relationship type used by the organization. This information helps users understand the member's relationship to the group when viewing client and household data.

"With Group Membership settings you can define if a Group is the member's primaryGroup." is also correct. A member can be associated with more than one group, and the primary-group setting identifies the group that should be treated as the member's principal group relationship. Financial Services Cloud uses this designation to support an appropriate consolidated view of related client information and rollups. Administrators should configure group and relationship data consistently so users can accurately work with household and group contexts. See Salesforce's Financial Services Cloud Basics learning module and the Salesforce Help search for Group Membership for product guidance.

QUESTION NO: 3

Cumulus Cloud Bank must provide its customer service staff with real-time access to customeraccounts, including the ability to view current transactions and balances. As a result, the bank expects a high volume of concurrent users at peak times.

Which option is most suitable?

A. Use the Data Consumption Framework to connect to the bank's middleware.

B. Use Salesforce Connect with External Objects to expose tables from the bank's core systems, and use custom Lightning web components to surface them in the Salesforce Lightning UI.

C. Use Salesforce Connect with External Objects to expose tables from the bank's core systems, and use the standard user interface (UI) components to surface the records in Salesforce Lightning UI.

D. Embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make callouts to the core system services.

ANSWER: D

Explanation:

Embed custom Lightning web components on the Account and Financial Account pages, and use custom Apex to make callouts to the core system services is the most suitable approach because it presents live, service-backed information directly within the service representative's established Salesforce workspace. A Lightning web component can provide a focused, bank-specific experience for current balances and transaction data, including loading states, filtering, pagination, and user-friendly error handling appropriate to the bank's service processes.

Apex callouts provide a controlled integration layer between Salesforce and the bank's core-system APIs. The implementation can centralize authentication, request and response transformations, timeout handling, and reusable service logic. This is especially valuable when the core platform exposes business services rather than data tables, or when current balances and transactions must be calculated or authorized by the core system at request time. The component and integration can also be designed to minimize payloads and retrieve only the information needed for the representative's current interaction, supporting responsive use during peak demand. Salesforce documents Apex HTTP callouts and their use for invoking external services at Apex Developer Guide: Callouts. Guidance for building Lightning web component user interfaces is available in the Lightning Web Components Developer Guide.

QUESTION NO: 4

How shoulddevelopers configure customized nodes for display in the Actionable Relationship Center (ARC)?

A. Reference the Lightning web component in the Display properties of the custom ARC relationship graph.

B. Select Use Flex Card from the node Display tab to show the node in a Flex Card

C. Reference the FlexCard in the Display properties of the custom ARC relationship graph.

D. Select Omni Script from the node Actions tab to show the node in an Omni Script.

ANSWER: C

Explanation:

"Reference the FlexCard in the Display properties of the custom ARC relationship graph." is correct because ARC relationship graphs use node-display configuration to determine what users see when they select or inspect a relationship node. A FlexCard is the supported OmniStudio presentation component for this purpose: it can retrieve and organize contextual Salesforce data and render it in a reusable, configurable card layout. Developers first create and activate the FlexCard, then associate it with the applicable custom relationship graph through that graph's Display properties. ARC can then invoke the configured card to provide a focused view of the node's record information within the relationship-exploration experience. This design separates the relationship model and graph configuration from the UI composition, allowing the same FlexCard pattern to be maintained and adjusted using OmniStudio tools while the graph continues to define the relationships and node behavior. Salesforce documents FlexCards as configurable UI components for displaying contextual data, and its Financial Services Cloud documentation describes ARC as the relationship-visualization experience built

around relationship graphs. See Salesforce's Actionable Relationship Center documentation and the FlexCards documentation.

QUESTION NO: 5

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

A. 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.

B. Assuming there are no other issues, what should happenwhen 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.

C. Custom objects are used to represent identification documents, other assets, liabilities, goals, and revenue. In the individual model, these objects are related to the Account object through lookup relationships.

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: C

Explanation:

Custom objects are used to model identification documents, other assets, other liabilities, financial goals, and revenue in an existing Financial Services Cloud organization that uses the individual account model. These Financial Services Cloud objects extend the core Salesforce data model so that information relevant to a person's financial profile can be stored in structured, reportable records rather than as unstructured files or notes. Each record is associated with the appropriate individual account through a lookup relationship to the Account object, enabling advisors and service teams to view the information in the context of the client's complete financial profile. For example, records can capture a client's nonfinancial assets and liabilities, planning objectives, income or revenue details, and identity-document information while retaining the individual account as the central client record. This relationship-based design also supports access control, reporting, automation, and a consolidated client view. Salesforce's Financial Services Cloud data model describes the industry objects that augment standard Salesforce objects, including objects used to represent client financial information and relationships. See the Salesforce Financial Services Cloud data model overview and the Financial Services Cloud data model documentation.

QUESTION NO: 6

The Salesforce Admin at Lake Tahoe Bank considering implementing Financial Services Cloud. What is thebest way for the Admin to access a Financial Services pre-configured org, including data and the right licenses, to learn about the product?

A. Request a 30-day Financial Services Cloud trial org

B. Request a Salesforce developer org.

C. Purchase one license of Financial Services Cloud and install it in a production org.

D. Spin up a Salesforce sandbox org.

ANSWER: A

Explanation:

Request a 30-day Financial Services Cloud trial org is the appropriate way to evaluate Financial Services Cloud in an environment designed specifically for product exploration. The trial provides a preconfigured Financial Services Cloud org with relevant functionality enabled, appropriate licenses, and sample data. This lets an administrator explore the Financial Account data model, relationship management, householding, action plans, and other industry capabilities without first having to build a configuration or acquire production licenses.

Using a purpose-built trial is especially valuable during early evaluation because the included sample records demonstrate how financial-services data and user experiences fit together in realistic scenarios. The administrator can validate requirements, test workflows, familiarize themselves with the setup experience, and demonstrate capabilities to stakeholders. Salesforce describes Financial Services Cloud as an industry solution built on the Salesforce platform and provides learning resources for understanding its specialized features. When the evaluation is complete, Salesforce account teams can help customers plan the appropriate production implementation and licensing model. See Salesforce's Financial Services Cloud overview and the Financial Services Cloud Basics Trailhead module.

QUESTION NO: 7

A financial institution is concerned about contacting clients or sharing their data when they have requestednot to be contacted.

Which action should the consultant take in Financial Services Cloud to address the institution'sconcern?

A. Integrate the Consent object with their Consent Platform to track it in Salesforce.

B. Hide the client's contact informationand add an approval process for allowing a user to access it to contact the client.

C. Implement Consent Management for Financial Services Cloud.

D. Enable and implement the iate Regulation checkbox on the client record to track their request.

ANSWER: C

Explanation:

Implement Consent Management for Financial Services Cloud because it provides the purpose-built framework for recording, maintaining, and applying a client's consent preferences across financial-services interactions. The institution can capture whether an individual has granted or withdrawn permission for specific contact channels, data uses, and business purposes. Those consent records can then be used to ensure that outreach and data sharing align with the client's stated preferences and the organization's compliance obligations. Consent Management also supports a centralized view of consent, which is important when multiple teams, processes, or integrated systems interact with the same client. Rather than relying on informal record visibility controls or a custom indicator, the consultant should use the product capability designed to model consent, track changes over time, and operationalize preference-aware engagement. Salesforce's consent-management features are intended to help organizations manage customer permissions and honor requests such as opting out of contact. Review Salesforce's Consent Management learning module and the Salesforce Consent Management documentation for configuration concepts and implementation guidance.

QUESTION NO: 8

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. Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.

B. Assign the Person Account record type to the user profiles.

C. Disable the Person Account custom setting.

D. Remove Person Account record types from the Individual Record Type Mapper.

E. Assign the Individual record type to the user profiles.

ANSWER: A D E

Explanation:

To move an organization from the Person Accounts model to Financial Services Cloud's individual object model, Salesforce Support must perform the conversion. This is not an administrator-controlled setup switch: it changes the organization's model and should be planned carefully, including validation in a sandbox where appropriate. The administrator must also

remove Person Account record type mappings from the Individual Record Type Mapper so that FSC processes use the intended Individual record types rather than attempting to map records to Person Account types. Finally, users who need to create and work with individual client records require access to the applicable Individual record type through their profiles. Record-type availability is managed through profile object settings, ensuring that the users who perform FSC work can select and access the correct record type. Together, Salesforce-led conversion, corrected record-type mappings, and profile-level record-type assignment establish the required configuration for using the individual model. Salesforce's Person Accounts documentation notes that Person Accounts affect the account and contact data model and require careful implementation planning. See Salesforce Help: Person Accounts Overview and Salesforce Help: Assign Record Types to Profiles.

QUESTION NO: 9

To access Financial Services Cloud Lightning Components "My Domain" must be enabled. How does the System Admin accomplish this?

A. Register a subdomain using the My Domain wizard and then deploy it

B. Open a case with Salesforce Support

C. Enable Communities

D. Go to Custom Settings and edit the Industries Settings

ANSWER: A

Explanation:

Register a subdomain using the My Domain wizard and then deploy it is correct because My Domain provides the organization-specific Salesforce domain required for features that rely on Lightning components and modern Lightning runtime behavior, including Financial Services Cloud Lightning functionality. From Setup, the system administrator opens *My Domain*, enters and checks the availability of a unique subdomain, registers it, tests the domain as needed, and deploys it to users. Deployment makes the new domain active across the organization and allows users to access Salesforce through the My Domain URL.

My Domain is also foundational to Salesforce identity and branding capabilities, and it is a prerequisite for a range of platform features that use Lightning, single sign-on, or custom domains. Administrators should communicate the URL change and validate integrations, bookmarks, and login processes before deployment, because users are subsequently directed to the organization's My Domain address. Salesforce documents the registration and deployment workflow in its My Domain setup guidance and explains the broader role of domains in the My Domain overview.

QUESTION NO: 10

A bank wants branch users to receive a warning when they create a client record that potentially duplicates an existing client. Which three duplicate-management capabilities should the Salesforce Administrator configure?

A. Create matching rules that identify likely duplicate client records.

B. Create duplicate rules that evaluate records when users create or edit them.

C. Configure duplicate rules to alert users or block the creation of duplicate records.

D. Create a custom Household for every possible duplicate client record.

E. Use Account Teams to merge duplicate records automatically.

ANSWER: A B C

Explanation:

A **Matching Rule** defines the criteria Salesforce uses to identify records that could represent the same client, such as matching name, email address, phone number, date of birth, or an external identifier. A **Duplicate Rule** uses the matching rule to evaluate records when users create or edit them. The duplicate rule can be configured to **alert users or block record**

creation, depending on the bank's data-governance policy. These declarative tools help reduce additional duplicate client records while allowing the organization to retain source-system identifiers and integration logic. See Salesforce Trailhead's Duplicate Management module for setup guidance.

QUESTION NO: 11

An investment bank is implementing Financial Services Cloud (FSC) to manage the deal pipeline. Each opportunity has confidentialinformation that the deal team members must only view. In addition, each member needs the ability to take and share notes directly within Salesforce with others on the team.

Which three FSC features should be part of the solution design?

A. Financial Deal Management

B. Sharing Rules

C. Compliant Data Sharing

D. Profiles

E. Interaction Summaries

ANSWER: A C E

Explanation:

Financial Deal Management is designed for investment-banking deal processes. It provides a financial-deal workspace and related records that let teams organize complex deal information, participants, activities, and deal progress in Financial Services Cloud. This provides the appropriate FSC foundation for managing the deal pipeline while retaining the deal context around opportunity-related work.

Compliant Data Sharing supports the requirement that confidential deal information be available only to the appropriate deal-team members. It is intended to help financial-services organizations apply controlled, relationship-aware access to sensitive data while supporting their compliance and information-barrier requirements. The design should use it to ensure that access to the deal is granted according to authorized team membership and the firm's sharing policy.

Interaction Summaries lets users document interactions and notes in Salesforce in a structured, shareable format. Deal-team members can capture meeting details, discussion points, follow-up actions, and relevant context directly against the appropriate client or deal-related records, enabling colleagues with authorized access to review and collaborate on the same information.

These capabilities combine deal-specific management, compliant access controls, and native team note capture. See Salesforce's Financial Services Cloud data model documentation and the Financial Services Cloud basics Trailhead module.

QUESTION NO: 12

A Financial Services Cloud implementation includes sensitive client records that should be available only to advisors assigned to the relevant business unit. Which three Salesforce security capabilities can the Administrator use to support this requirement?

A. Organization-wide defaults

B. Role hierarchy

C. Sharing rules

D. Compact layouts

E. Global actions

ANSWER: A B C

Explanation:

Organization-wide defaults, **role hierarchy**, and **sharing rules** are all core Salesforce capabilities for controlling record-level access. Organization-wide defaults establish the baseline level of access for records such as Accounts, Opportunities, and Cases. A Private baseline can prevent users from viewing records they do not own or otherwise have access to.

The role hierarchy can extend record access upward to managers when that matches the institution's reporting structure. Sharing rules can then grant access to selected users, roles, territories, or public groups based on record ownership or criteria, such as the client's business unit. These controls work with object permissions and field-level security to provide a complete security design. See Salesforce documentation on organization-wide defaults and sharing rules.

QUESTION NO: 13

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a members Financial Account Balances are not adding up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

A. Ensure the Primary Group flag in the Account record is checked.

B. Ensure RollUpByLookup Configuration is Active

C. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.

D. Ensure that the member is the Primary Member in that Household

E. Ensure the reported Household is the Primary Group for the member

ANSWER: B E

Explanation:

Ensure RollUpByLookup Configuration is Active because Financial Services Cloud uses Rollup By Lookup to calculate and maintain aggregate values, including Financial Account balance information represented on household Financial Summary data. The relevant configuration must be active for its criteria, source records, target records, and aggregation logic to be evaluated. Confirming that activation is therefore an essential first diagnostic step when a balance is absent or appears incomplete.

Ensure the reported Household is the Primary Group for the member because FSC uses the member's primary group relationship to identify the household that should receive household-level rollups. A member can be associated with more than one group or household, but the primary-group designation establishes the appropriate relationship for this type of household summary calculation. Once the intended household is identified as the member's Primary Group and the rollup configuration is active, Financial Account balances can be associated with the correct household summary context and included in the calculated Financial Summary.

Salesforce describes the Rollup By Lookup framework in the Rollup By Lookup documentation. For FSC household and relationship concepts, see the Financial Services Cloud Basics Trailhead module.

QUESTION NO: 14

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

A. Make the Adams Household Scott's primary group and select Tie Activities & Objects to Roll Up.

B. Add Scott as a Related Contact to the Adams Household.

C. Make the Adams Household Scott's primary group and make Scott the primary member.

D. Disable the Primary Group setting for Scott on the Adams Household.

ANSWER: A

Explanation:

Make the Adams Household Scott's primary group and select *Tie Activities & Objects to Roll Up*. In Financial Services Cloud, household membership is managed through relationship groups and relationship group members. A contact can belong to more than one group, but the Primary Group designation identifies the household or group that should receive the contact's rollup context. Setting Adams Household as Scott's primary group establishes Scott as a member whose information is associated with that household, while allowing Rachel to remain the household's primary member.

The *Tie Activities & Objects to Roll Up* setting controls whether Scott's supported activities and related records are included in the household-level rollups. This is particularly important for a joint-account scenario because the banker needs a consolidated view of household engagement and records without changing the household's designated primary member. These relationship-group settings support FSC's household-centric data model and help bankers view client information in the appropriate household context. Salesforce describes the FSC relationship-group model in its Relationship Group Member object reference and provides household data-model guidance in Financial Services Cloud Data Models.

QUESTION NO: 15

The Compliant Data Sharing (CDS) feature lets administrators and compliance managers configure advanced data-sharing rules so that they can improve compliance with regulations and company policies.

Which three things should be considered when implementing CDS in Financial Services Cloud (FSC)?

A. To disable CDS for an object, any Participant Roles associated with that object must be deleted first.

B. CDS in FSC allows record owners to grant access to their records to other FSC users.

C. CDS can only be applied to FSC objects and Account and Opportunity objects.

D. To get the benefits of CDS, administrators must set organization-wide sharing settings for supported objects to the Private access model.

E. Users above the record owner in the Role Hierarchy and non-record owners with Edit access granted through CDS have the same ability/access as record owners,

ANSWER: B C D

Explanation:

Compliant Data Sharing is designed to provide controlled, participant-based access to sensitive Financial Services Cloud records. It enables a record owner to use participant roles to grant appropriate access to other Financial Services Cloud users, allowing collaboration while keeping access aligned with a firm's compliance requirements. The owner can manage those participants from the supported record experience rather than relying solely on broad, static sharing arrangements.

Implementation planning must also account for object support. Compliant Data Sharing applies to supported Financial Services Cloud objects as well as Account and Opportunity; it is not a universal sharing mechanism for every standard or custom object. Administrators should therefore identify the supported records that require participant-based access before designing roles and operational processes.

Finally, supported objects should use a Private organization-wide default to realize the intended protections. A Private baseline ensures that access is not automatically available across the organization, so participant assignments can grant access deliberately and only where needed. This baseline is central to using CDS to enforce more precise access controls. Salesforce describes Financial Services Cloud sharing and access controls in its Compliant Data Sharing documentation and its organization-wide defaults documentation.

QUESTION NO: 16

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. Word document telling the story of the process from the user's perspective

B. An Excel spreadsheet with steps of the process as rows, and systems and personas in columns

C. An end-to-end visual map of the process using personas, systems, inputs, and outcomes

D. A PowerPoint deck with screenshots of the current systems and callouts to what is happening on each slide

ANSWER: C

Explanation:

An end-to-end visual map of the process using personas, systems, inputs, and outcomes is the appropriate current-state deliverable. A visual process map gives stakeholders a shared, structured view of how work actually moves through the organization before any Financial Services Cloud design decisions are made. It captures the people or roles involved, the systems they use, the information or triggering inputs they receive, the activities and handoffs that occur, and the resulting business outcomes. This makes dependencies, manual work, duplicated data entry, integration touchpoints, approval points, and potential pain points visible across the full journey rather than documenting each team or application in isolation.

For an FSC implementation, understanding the current state at this level supports discovery and solution design: the consultant can identify where Salesforce should become the system of engagement, where data must be integrated, and which processes should be standardized or improved in the future-state design. It also provides a practical artifact for validating the consultant's understanding with business and technical stakeholders. Salesforce's implementation guidance emphasizes discovery, stakeholder alignment, and documenting processes before configuration work begins. See Salesforce's business process mapping overview and the Salesforce implementation basics Trailhead module.

QUESTION NO: 17

Which three standard fields are available to track a customer's retirement gial progress?

A. Contributions

B. Actual value

C. Total Value

D. Target value

E. Target Date

ANSWER: B D E

Explanation:

Financial Services Cloud uses Financial Goal records to represent and monitor client objectives, including retirement planning goals. The standard field **Actual value** captures the goal's current monetary amount, providing the baseline for evaluating how much progress the customer has made. **Target value** stores the desired monetary amount the client intends to achieve. Comparing the actual amount with the target amount enables advisors and clients to assess the remaining financial gap and measure progress toward the retirement objective. **Target Date** identifies the planned date by which the customer expects to reach that target. This adds the time dimension required for retirement planning, helping advisors evaluate whether the current progress is aligned with the client's intended retirement timeline. Together, these fields record the current position, desired outcome, and expected completion date—the core information needed to track a retirement goal over time. Salesforce documents Financial Goal as a Financial Services Cloud data model object and exposes its standard fields for use in goal-management processes. See the Salesforce Financial Goal object reference and the Financial Services Cloud object reference.

QUESTION NO: 18

A consultant is building an agent console for an insurance company using FlexCards to provide a 360-degree view of its customers. An Integration Procedure will be used to retrieve Account, Opportunity, andContract data. The agent wants the following information displayed:

• Account information including account name, phone, and website

• Active opportunities related to the Account

• Active insurance policies related to the Account

• The ability to view andrenew policies

How should the consultant design the FlexCards to meet these requirements?

A. Parent FlexCard with single Child and Card Actions

B. Parent FlexCard with multiple Child FlexCards and Card Actions

C. Parent FlexCard with multiple Children and different Card States

D. Parent FlexCard with single Child and multiple Card States

ANSWER: B

Explanation:

Parent FlexCard with multiple Child FlexCards and Card Actions is the appropriate design because it separates the customer overview from each related collection while keeping all information available in a unified agent experience. The parent card can present the Account-level details, such as name, phone, and website, as the primary customer context. Multiple child cards can then be embedded to render the distinct related data sets returned by the Integration Procedure: one child card for active opportunities and another for active insurance policies. This composition supports a scalable 360-degree view, since each child card can be configured with its own data source, layout, conditional display rules, and navigation behavior.

Card Actions provide the required operational capability directly from the policy information. An action can open a details view for a policy and can invoke a process, such as an Integration Procedure, OmniScript, URL, or other configured action, to initiate renewal. This lets agents review customer and policy context and take the renewal action without leaving the console workflow. Salesforce describes FlexCards as reusable UI components that can display contextual data and support actions; parent-child FlexCard composition is specifically intended for presenting related information. See the Salesforce OmniStudio FlexCards documentation and the Salesforce FlexCard Actions documentation.

QUESTION NO: 19

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify apublished Action Plan to support an additional task she needs in order to completean 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. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.

C. Usethe Action Plan item feature to add an additional task to a published Action Plan.

D. Create an independent Task not related to original Action Plan

ANSWER: C

Explanation:

Use the Action Plan item feature to add an additional task to a published Action Plan. An Action Plan represents the set of work being completed for a particular client-related process, such as an annual review. Action Plan items provide the individual, actionable steps within that plan and can be used to tailor the work required for the specific client engagement. By adding an item directly to the existing Action Plan, Jen keeps the new task connected to the annual-review workflow, its owner, status tracking, and the client context that the plan supports. This approach also preserves a complete operational record of the work performed as part of the review rather than separating an additional requirement from the plan. Financial

Services Cloud models action-plan management with Action Plans and their associated items, allowing teams to organize and manage the work that comprises a plan. Salesforce's Action Plan Management data model describes these related records and their role in managing structured work. See the Salesforce Action Plan Management data model and Salesforce's Action Plans documentation for further details.

QUESTION NO: 20

Which three of the following statements are correct about the Actionable Relationship Center Manager (ARC)?

A. To enable users to see the ARC, you will need to add the component for ARC to the page layout.

B. ARC displays up to 5 related lists that have a configured compact layout.

C. ARC is certified to work with Person Accounts and Individual Accounts.

D. The Salesforce Admin has to create a permission set for granting access to the ARC – FSC Lightning component.

E. The Association Type picklist controls the account-account relationship that display in the ARC.

ANSWER: A D E

Explanation:

To make the Actionable Relationship Center available to end users, an administrator adds the ARC Lightning component to the relevant Account record page. This places the relationship visualization and its actions in the users' Account experience, where they can work with related people, households, and organizations. Access must also be deliberately granted through a permission set containing the permissions for the ARC–FSC Lightning component. This follows Salesforce's permission-based access model and lets an administrator assign ARC access only to the users who need it.

The Association Type picklist on an account-account relationship is also central to how ARC presents relationships. It classifies the relationship between the two Account records and determines which account-account relationship records ARC displays. Administrators can therefore use association types to ensure the relationship view reflects the organization's intended business or household relationship model. Salesforce's Financial Services Cloud relationship-management materials describe the relationship data model and the use of account relationships in client relationship views. See Salesforce Help: Actionable Relationship Center and Salesforce Trailhead: Financial Services Cloud Basics.

QUESTION NO: 21

What is a key step in identifying different business processes and outlining encompassing system flows based on the existing environment when setting up Salesforce Financial Services Cloud (FSC)?

A. Creating a new Salesforce instance from scratch for the customer

B. Importing the customer's existing data into Salesforce FSC without any modifications

C. Implementing a generic, one-size-fits-all solution for all customers

D. Conducting a gap analysis between the customer's current processes and Salesforce FSC capabilities

ANSWER: D

Explanation:

Conducting a gap analysis between the customer's current processes and Salesforce FSC capabilities is a key discovery and solution-design activity. The team first documents how work is performed today, including client onboarding, household and relationship management, service requests, referrals, compliance activities, integrations, data sources, users, and approval paths. It then maps those process and system-flow requirements to the Financial Services Cloud data model, standard features, automation tools, and integration capabilities. This comparison identifies where FSC meets the requirement through configuration, where process redesign or data transformation is needed, and where a justified custom solution or integration is required.

Gap analysis makes the future-state design traceable to the customer's actual operating environment rather than assuming that every organization should use an identical implementation pattern. It also gives stakeholders a practical basis for prioritizing requirements, defining the implementation scope, documenting decisions, and planning migration and integration work. This aligns with Salesforce's architecture guidance to understand business capabilities, current-state systems, and desired outcomes before making solution decisions. See Salesforce's Enterprise Architecture Decision Guide and the Financial Services Cloud Basics Trailhead module.

QUESTION NO: 22

Which 3 options does the Financial Services Cloud application offer to view and update Account-Account. Account-Contact, and Contact-Contact Relationships?

A. Actionable Relationship Center

B. Family Members Component

C. Relationship Map

D. Group Members Component

E. Life Events Component

ANSWER: A C D

Explanation:

Financial Services Cloud provides several complementary relationship-management experiences for understanding and maintaining the connections among people, households, businesses, and groups. **Actionable Relationship Center** is a centralized workspace in which users can explore a client's relationship network and take actions to create or maintain relationship records. **Relationship Map** presents those connections visually, helping users understand the structure and context of related accounts and contacts while working with relationship information. **Group Members Component** supports relationship management in the context of groups, enabling users to view and maintain the members associated with a group and the relevant relationship structure. Together, these capabilities support Account-Account, Account-Contact, and Contact-Contact relationship use cases rather than treating relationships as isolated record lists. This relationship-focused data model is a core part of Financial Services Cloud's ability to represent households, business relationships, and other financial networks. See Salesforce's Financial Services Cloud Developer Guide and the Financial Services Cloud Basics Trailhead module for an overview of FSC relationship-management capabilities.

QUESTION NO: 23

An advisor is setting up a Household in Financial Services Cloud for their new clients, Oliver and Macie Dogging ton. The advisor created a Person Account record for both Oliver and Macie, and a Household record for the Dogging ton household. While creating the Household group, the advisor attempted to input the below information but received an error.

Member Name: Oliver Dogging ton

Role in Group: Client

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Member Name: Macie Dogging ton

Role in Group: Spouse

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Based on the information provided, what caused the error that the advisor received?

A. Primary Member - two individuals cannot be designated as the Primary Member of the same Household.

B. Spouse is not a valid Role within a Group.

C. Primary Group -two individuals cannot designate the same Household as their Primary Group.

D. Activities and Objects to Roll Up - two individuals cannot designate their activities to roll up to the same Household.

ANSWER: A

Explanation:

Primary Member - two individuals cannot be designated as the Primary Member of the same Household. In Financial Services Cloud, a household or group can have multiple members, but it can have only one primary member. The primary member identifies the main person associated with that household and is used by Financial Services Cloud features that calculate and present household-level rollups, such as financial-account balances and net worth. Because both Oliver Dogging ton and Macie Dogging ton are marked as Primary Member for the same Dogging ton household, the membership configuration violates this one-primary-member constraint and produces the error. The advisor must select either Oliver or Macie as the household's primary member, while retaining the other person as a household member with the appropriate role, such as Spouse. A household can still be the primary group for more than one individual, and members can be configured to roll up activities and supported objects to that shared household. Salesforce documents the household data model and its use of Account Contact Relationship records for household membership in the Financial Services Cloud Household Data Model. For implementation context on household relationships and member roles, see Set Up Households.