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Question: 1

During the design phase of a project, a consultant needs to provide a Agentforce Financial Services 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 can create both standard and hierarchical questions.
B. Discovery Framework is built based on Salesforce Flow.
C. Financial Services Cloud Discovery Framework allows archiving questions.
D. Discovery Framework creates highly capable forms with integrations and advanced logic.
E. Discovery Framework forms cannot be deployed to Communities.

Answer: A, C, D

Explanation:
Discovery Framework is Salesforce's questionnaire-driven data collection capability for Agentforce Financial Services. It is designed for processes such as customer onboarding, financial-needs analysis, eligibility assessments, and other structured information-gathering scenarios. Administrators can create both independent assessment questions and hierarchical parent-child questions. A related question can be associated with a parent question, enabling dependent question structures appropriate for conditional assessments. Salesforce currently supports a defined hierarchy level for these related assessment questions.

Question lifecycle management is also built into the framework. Assessment questions support versions, and when a new version replaces an active version, the previous version can transition to Archived status. This provides controlled change management and supports auditability of questionnaire content.

Discovery Framework uses OmniStudio, rather than Salesforce Flow as its foundational form technology. OmniStudio enables sophisticated forms incorporating branching, rendering rules, data integration, and conditional logic. Forms can also be activated and deployed through supported Salesforce experiences, including Experience Cloud scenarios, so option E is incorrect. Salesforce specifically describes Discovery Framework as combining its assessment-question data model with OmniStudio to support complex digital forms.

Question: 2

Which three permission sets grant access or extend permissions for record alerts in Agentforce Financial Services?

A. Financial Services Cloud Foundations permission set
B. Financial Services Cloud Basic permission set
C. OmniStudio Admin permission set
D. OmniStudio User permission set
E. Financial Services Cloud Standard permission set

Answer: A, D, E

Explanation:
Record Alerts are designed to surface actionable notifications directly in the context of client and financial records. They can represent information maintained in Salesforce or supplied by external banking systems and can be displayed through OmniStudio-based components. Consequently, the access model spans both Agentforce Financial Services permissions and OmniStudio runtime capabilities.

The Financial Services Cloud Foundations permission set supplies access to common Financial Services capabilities and the underlying objects required by features such as Record Alerts. The Financial Services Cloud Standard permission model provides access to standard Financial Services functionality and components used by licensed Financial Services users. The OmniStudio User permission set extends runtime access to the OmniStudio capabilities used by Financial Services implementations, including the components through which alerts can be surfaced.

Salesforce separates ordinary feature consumption from administrative design responsibilities. OmniStudio administrative permissions are associated with configuration and management of artifacts such as FlexCards and Integration Procedures rather than representing the ordinary Financial Services end-user permission layer tested by this question. Record Alerts themselves support alert severity, categories, snoozing, dismissal, external-system data, and hierarchical presentation of related alerts.

Question: 3

A regional bank is implementing Agentforce Financial Services. Today, relationship managers receive email reminders 2 days, 2 weeks, and 2 months after a new customer opens their first bank account to contact the customer for feedback. In addition, the bank wants the ability for relationship managers to track and report on progress in Agentforce Financial Services. What should the administrator do when designing the future state business process using Agentforce Financial Services features?

A. When a lead or referral is converted, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.

B. When an account status is changed to "Customer", send emails to the Account Owner to follow up in 2 days, 2 weeks, and 2 months.
C. When an account status is changed to "Customer", create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
D. When creating an account, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.

Answer: C

Explanation:
An Action Plan is the appropriate Agentforce Financial Services capability when an organization has a standardized sequence of activities that must occur at defined intervals and needs those activities to remain visible and reportable in Salesforce. Action Plan Templates define repeatable tasks, task ownership, sequencing, and date offsets. When an Action Plan is instantiated, those template items become operational tasks that relationship managers can complete and track.

In this scenario, the meaningful business event is the customer's transition to an established Customer state after opening the first banking relationship. That event should initiate an Action Plan containing follow-up tasks scheduled at the required 2-day, 2-week, and 2-month offsets. This accurately aligns the operational workflow with the point at which the individual becomes a customer.

Simple email notifications do not provide the same task lifecycle, completion status, ownership, reporting, and dashboard capabilities. Similarly, triggering the plan at initial Account creation or lead conversion could occur before the required customer milestone. Salesforce specifically positions Action Plans for repeatable engagements such as account openings and allows task deadlines and ownership to be standardized while supporting reports and dashboards for progress monitoring and compliance.

Question: 4

An Agentforce Financial Services administrator is setting up a permission set for Actionable Relationship Center. Which license should the administrator select on the Permission Set setup page?

A. Financial Services Cloud Standard
B. Financial Services Cloud Basic
C. OmniStudio
D. Financial Services Cloud Extension

Answer: A

Explanation:

The appropriate permission-set license for this Actionable Relationship Center configuration is Financial Services Cloud Standard. ARC is a core Agentforce Financial Services capability that provides an interactive graphical representation of relationships among customers, households, businesses, contacts, and other supported records. It is intended to operate within the Financial Services security and licensing framework rather than as an independent OmniStudio-only feature.

When administrators establish ARC access, the permission set must be associated with an appropriate Financial Services license so that users have entitlement to the underlying Financial Services functionality and components. Users without the required Financial Services permission set or associated license can encounter missing components, unavailable actions, or access failures.

ARC itself can build graphs from standard and custom objects, expose record actions, and display relationship information on Lightning record pages. OmniStudio becomes relevant when administrators enhance ARC nodes with FlexCards, but that does not make OmniStudio the base license for the ARC permission set. The Financial Services Standard licensing model provides access to the standard Financial Services components required by users working with core FSC functionality.

Question: 5

Cumulus Bank is migrating its CRM software from a legacy application to Agentforce Financial Services. The bank hired Salesforce Professional Services to configure/deploy the new Agentforce Financial Services org and migrate data. Which order should a consultant follow when performing the data migrations?

A. Financial Accounts, then Financial Account Transactions, then Financial Account Roles, then Individuals
B. Financial Accounts, then Financial Account Roles, then Individuals, then Financial Account Transactions
C. Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions
D. Individuals, then Financial Account Roles, then Financial Accounts, then Financial Account Transactions

Answer: C

Explanation:
Financial Services data migration must respect the referential dependencies among customer, account, role, and transaction records. Therefore, the correct sequence is Individuals, then Financial Accounts, then Financial Account Roles, and finally Financial Account Transactions.

Individuals are loaded first because they represent the parties who ultimately own, participate in, or otherwise relate to financial accounts. Once those customer records exist, Financial

Account records can be created and associated with their owners. Financial Account Role then describes how a person or organizational entity participates in that Financial Account—for example as primary owner, joint owner, beneficiary, or trustee.

The Financial Account Roles must therefore reference financial accounts and customer records that already exist. Salesforce also requires each Financial Account to have an active role representing a Primary Owner in configurations that use the managed-package model; missing ownership relationships can produce data-loading problems.

Financial Account Transactions logically follow the account structure because transaction records belong to established Financial Accounts. Loading parent and reference data before dependent transactional data minimizes lookup failures and preserves relationship integrity during migration.

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