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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q39-Q44):

NEW QUESTION # 39

A financial services company offers special deposit products for its employees. These employees have customer records in Salesforce so that they can be serviced like normal customers. Only customer service employees within a specific group should be able to see these special deposit products in Salesforce to protect the personal financial information of bank employees. How should the administrator configure sharing rules in Financial Services Cloud to meet these requirements?

- A. Create a Financial Account sharing rule based on criteria
- B. Create Account sharing rules based on criteria.
- C. Create an Account sharing rule based on record owner.
- D. Create a Financial Account sharing rule based on record owner.

Answer: A

Explanation:

To meet the requirements of sharing special deposit products for employees, the administrator should create a Financial Account sharing rule based on criteria. A Financial Account sharing rule is a sharing rule that grants access to financial account records based on record owner or field values. A sharing rule based on criteria is a type of sharing rule that grants access to records that meet certain criteria. By creating a Financial Account sharing rule based on criteria, the administrator can share the special deposit

products with the customer service employees within a specific group based on a field value that indicates the product type.

NEW QUESTION # 40

Which three permission sets grant access or extend permissions for record alerts in Financial Services Cloud (FSC)?

- A. OmniStudio Admin permission set
- B. FSC Basic permission set
- C. FSC Foundations permission set
- D. OmniStudio User permission set
- E. FSC Standard permission set

Answer: C,D,E

Explanation:

Record alerts are a feature of Financial Services Cloud that let users create and display alerts on record pages to highlight important information or actions. Record alerts are based on OmniStudio, a low-code platform for building digital experiences in Salesforce. To access or extend permissions for record alerts in Financial Services Cloud, users need to have one of the following permission sets:
FSC Standard permission set: This permission set grants access to the core features of Financial Services Cloud, including record alerts. Users with this permission set can view and create record alerts on supported objects, such as accounts, contacts, financial accounts, and opportunities¹.

FSC Foundations permission set: This permission set grants access to the common features of Financial Services Cloud that are shared across subverticals, such as retail banking, wealth management, and insurance. Users with this permission set can view and create record alerts on supported objects².

OmniStudio User permission set: This permission set grants access to the OmniStudio features, such as OmniScripts, DataRaptors, Integration Procedures, and Record Alerts. Users with this permission set can view and create record alerts on any object that has the Record Alert component enabled³.

References:

FSC Standard Permission Set

FSC Foundations Permission Set

OmniStudio User Permission Set

NEW QUESTION # 41

What step is required to give users access to the Financial Services Cloud Commercial Banking features?

- A. Assign permission sets to give users access to the Commercial Banking Console Lightning app.
- B. Install the Commercial Banking Managed Package
- C. Update Industries Settings to give users access to the Commercial Banking Console Lightning app.
- D. Update the user profiles to give users access to Financial Services Cloud objects

Answer: A

Explanation:

To give users access to the Financial Services Cloud Commercial Banking features, such as Commercial Banking Console Lightning app, Referrals List component, and Treasury Services object, the Admin needs to assign permission sets to the users. Permission sets are collections of settings and permissions that give users access to various tools and functions⁴. The Admin can use the following permission sets to enable Commercial Banking features for the users⁴:

FSC Commercial Banking Console User: This permission set gives users access to the Commercial Banking Console Lightning app, which is a custom app that provides a unified view of commercial banking clients and their financial needs⁴.

FSC Commercial Banking Referrals User: This permission set gives users access to the Referrals List component, which is a Lightning component that displays a list of referrals related to a business account⁴.

FSC Commercial Banking Treasury Services User: This permission set gives users access to the Treasury Services object, which is a custom object that represents a treasury service product or offering that a commercial banking client uses or is interested in⁴.

Verified References: ⁴

NEW QUESTION # 42

Which two statements are true for a Group in Financial Services Cloud?

- A. A group is a type of account record that people and businesses can be related to through the Financial Account relationship object
- B. A group is a type of account record that people and businesses can be related to through the account contact relationship object.
- C. Financial Services Cloud includes a group record type for households
- D. Financial Services Cloud includes a group record type for businesses

Answer: B,C

Explanation:

The following statements are true for a Group in Financial Services Cloud:

Financial Services Cloud includes a group record type for households, which is a record type that represents a collection of individuals who share financial goals, such as family members or roommates.

A group is a type of account record that people and businesses can be related to through the account contact relationship object, which is a junction object that links an account to a contact or an individual and defines their role or relationship with that account.

NEW QUESTION # 43

Which two limitations should a Salesforce Administrator consider before enabling Person Accounts?

- A. AppExchange packages will not work if Person Accounts are enabled
- B. Person Accounts can be enabled and disabled only by contacting Salesforce Support
- C. Person Accounts cannot be disabled once they were enabled
- D. Creating a client record via Salesforce Inbox is not supported.

Answer: C,D

Explanation:

The following limitations should be considered before enabling Person Accounts in Financial Services Cloud:

Person Accounts cannot be disabled once they were enabled. Enabling Person Accounts is an irreversible action 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 enabling it in production.

Creating a client record via Salesforce Inbox is not supported. Salesforce Inbox is a feature that allows you to access Salesforce data and actions from your email application. However, you cannot use Salesforce Inbox to create a client record as a Person Account. You can only create a client record as an Individual Model record using Salesforce Inbox. Verified References: : Salesforce Help Article 4 : Salesforce Help Article 5

NEW QUESTION # 44

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