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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q113-Q118):

NEW QUESTION # 113

What does the Salesforce Admin have to install to provide users access to referral dashboards and reports?

- A. Einstein Analytics for Financial Services
- B. The managed extension package for intelligent Need-Based Referrals and Scoring
- C. Salesforce CRM Dashboards
- D. The unmanaged extension package for Intelligent Need-Based Referrals and Scoring

Answer: D

Explanation:

The unmanaged extension package for Intelligent Need-Based Referrals and Scoring provides users access to referral dashboards and reports, as well as referral scoring and routing features.

NEW QUESTION # 114

How can the Salesforce Admin help agents who deal with a large number of customers on a daily basis, quickly scan the Life Events component and find the information they need without much effort?

- A. The Admin can change the color of important life events to red.
- B. The user can customize the order of life events to be set in chronological order
- C. The Admin can customize the order of life events to be set in chronological order.
- D. The user can change the color of important life events to red.

Answer: A

Explanation:

The Admin can change the color of important life events to red by using custom CSS in a Lightning App Builder theme layout component. This way, the agents can quickly scan the Life Events component and find the information they need without much effort. The color red can draw attention and indicate urgency or importance for certain life events.

NEW QUESTION # 115

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

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 # 116

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

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

Answer: A,B,D

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 # 117

The Salesforce Admin of Lake Tahoe Wealth Management Company needs to update an existing, published Action Plan Template to accommodate a change in the firm's annual client review process. What steps should the Admin take to make that change?

- **A. Clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template.**
- B. Edit the published Action Plan Template directly.
- C. Set the Action Plan Template to "Inactive" and then make changes to the template, as necessary.

Answer: A

Explanation:

To update an existing, published Action Plan Template, the Admin should clone the existing Action Plan Template and make any necessary changes on the new Action Plan Template. This is because published Action Plan Templates cannot be edited directly or set to inactive⁴. Cloning an Action Plan Template creates a copy of it with a new name and ID, which can then be modified and published⁴. Verified References: 4

NEW QUESTION # 118

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