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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q120-Q125):

NEW QUESTION # 120

A user at Universal container reports an error message when attempting to log in. the administrator checks the user's login history, but there is no record of the attempted login.
What could be cause of this issue?

- A. The user is attempting to log in outside of the profile IP
- B. The user is attempting to log in outside of the profile login range
- C. The user is attempting to log in with wrong password
- D. The user is attempting to log in with wrong username

Answer: D

NEW QUESTION # 121

A system administrator at a financial services company wants to build a report to show Interest Tags. Which two things should the administrator consider when configuring the report?

- A. The user must build a report using the Topics object to view Interest Tags in the report.
- B. To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name.
- C. When the user defines the custom report type, Topics should be selected as the Primary Object.
- D. When the user defines the custom report type, Tag Categories should be selected as the Primary Object.

Answer: B,C

Explanation:

Interest Tags are a feature of Financial Services Cloud that let users add custom tags to client records to capture client needs, interests, and prospecting opportunities. Some of the things to consider when configuring a report to show Interest Tags are: When the user defines the custom report type, Topics should be selected as the Primary Object. Topics is the standard Salesforce object that stores the Interest Tags data⁴. The user can then add other objects as secondary objects, such as Accounts, Contacts, or Opportunities.

To show Interest Tags applied to specific objects, the user can add a filter in the report and select the object name. For example, to show only Interest Tags related to Accounts, the user can add a filter for Entity Type equals Account⁵.

References:

Interest Tags

Build an Interest Tags Report

NEW QUESTION # 122

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.
- B. Use Process Builder to create a workflow to summarize data at the Person Account level.
- C. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- D. Create a custom object to track client's financial data

Answer: A

Explanation:

Explanation

A Primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use Primary Group to roll up financial data from all the financial accounts that are related to the client or the group. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION # 123

A corporate investment banking associate at Cumulus Capital works with a trusted analyst to create pitch books, analyze market data, and generate reports. The banking associate is looking to capture sensitive deal information in Salesforce. They wish to share the deal information with the trusted analyst only, without giving access to Salesforce users up the management chain in the Role Hierarchy.

What should a consultant do in Salesforce to build the required sharing model for sensitive deal data?

- A. Use the Financial Deal object to capture the deal data and use restriction rules to block user access above the banking associate in the Role Hierarchy.
- B. Use the Financial Deal object to capture

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