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## **Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q59-Q64):**

### **NEW QUESTION # 59**

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

**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 # 60**

A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories.

Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?

- A. Configure Financial Account record types to match the required categories.
- B. Add the Financial Account List component to the Account Lightning record page.
- C. Create Account lookup fields on the Financial Account object to link the Financial Accounts to an Account.
- D. Create a custom picklist on the Financial Account object to track the Type
- E. Configure the Financial Account List components for each required category.

**Answer: C,D,E**

Explanation:

The following considerations should be included when configuring the report with branch management reportable objects:

Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.

The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial ServicesCloud. Banker is an object that represents a banker or an employee who works at a branch unit.

Branch Unit is an object that represents a physical location where bankers provide services to customers.

Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.

When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects.

## NEW QUESTION # 61

During a project's design phase, a consultant must provide a Financial Services Cloud solution that can support CompliantData Sharing (CDS). What are three things the consultant should consider regarding CDS?

- A. In a standard Salesforce org, Role Hierarchy for Account and Opportunity objects is enabled by default and can't be turned off.
- B. Compliance managers and Salesforce administrators can enable CDS for Account and Opportunity objects.
- C. Participant Roles provide another way to grant data access without overwriting sharing behavior from existing sharing features.
- D. A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories. Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?
- E. Role Hierarchy-based sharing is disabled by default in CDS.

**Answer: B,C,E**

Explanation:

Reference: Compliant Data Sharing in Financial Services Cloud | Salesforce Trailhead Explanation: Compliant Data Sharing (CDS) is a feature of Financial Services Cloud that allows granular control over access to sensitive data in Account and Opportunity objects. CDS can help financial services companies comply with regulations and policies that restrict data visibility based on user roles. Some considerations regarding CDS are:

Participant Roles provide another way to grant data access without overwriting sharing behavior from existing sharing features. Participant Roles are custom objects that define the possible roles for users who need access to Account or Opportunity records. For example, a Participant Role can be Advisor, Client, Specialist, or Decision Maker. Each Participant Role has an associated access level that determines what data fields the user can view or edit. For example, an Advisor can have full access to all fields, while a Client can have read-only access to some fields.

Compliance managers and Salesforce administrators can enable CDS for Account and Opportunity objects.

CDS is not enabled by default in Financial Services Cloud. To enable CDS, compliance managers or administrators need to create an integration definition record for each object that they want to enable CDS for.

An integration definition record specifies the object name, the field name that contains sensitive data (such as Notes), the field name that contains the record owner (such as OwnerId), and the field name that contains the record type (such as RecordTypeId).

Role Hierarchy-based sharing is disabled by default in CDS. Role Hierarchy is a feature of Salesforce that allows users to inherit access to records from their managers or peers in the role hierarchy. For example, if a user has access to an Account record, their manager also has access to that record by default. However, in CDS, role hierarchy-based sharing is disabled by default for Account and Opportunity objects. This means that users do not inherit access to records from their role hierarchy unless they are explicitly granted access through Participant Roles or other sharing features.

## NEW QUESTION # 62

A major Japanese bank is expanding geographically and opening additional branches in Asia. As such, they hired a regional consulting firm to implement Financial Services Cloud (FSC) locally.

What are the two expectations from implementing multi language features in FSC?

- A. In Tokyo branches, the names of the Account, Prospect & Contact are in Japanese, but the package Advisor, Personal Banker, Relationship Manager, and Client Associate profiles are in English.
- B. Bankers in Japan have been accessing FSC in Japanese, but the new bankers in China will be accessing FSC in Chinese.
- C. In Seoul, South Korea, the branch managers will be reviewing their FSC dashboards every morning in Korean, while their colleagues in " Shanghai, China, will be doing so in Chinese.
- D. Referrals in Singapore and Hong Kong will be shared in English, but in Macau, referrals will be shared in Portuguese.

**Answer: B,C**

Explanation:

The following expectations are from implementing multi language features in FSC:

Bankers in Japan have been accessing FSC in Japanese, but the new bankers in China will be accessing FSC in Chinese. This expectation means that FSC supports multiple languages and allows users to choose their preferred language for their user interface and data display.

In Seoul, South Korea, the branch managers will be reviewing their FSC dashboards every morning in Korean, while their colleagues in Shanghai, China, will be doing so in Chinese. This expectation means that FSC supports multiple languages for reports

and dashboards and allows users to view them in their preferred language.

### NEW QUESTION # 63

A Salesforce Admin is configuring a new Action Plan Template. One task in that template needs to be picked up by the next available Advisor. What assignment logic should the Admin use when configuring this template task?

- A. Queues
- B. Role
- C. Specific User
- D. Action Plan Creator
- E. Account Team

**Answer: A,B,E**

### NEW QUESTION # 64

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