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Scrum PSPO-II

Professional Scrum Product Owner II

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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q57-Q62):

NEW QUESTION # 57

Lake Tahoe Bank wants their customer reps to be able to see client records such as Person Accounts, but want to restrict access to Financial Accounts to protect the privacy of their clients. Which two steps can an admin take to ensure that all users see Person Accounts, but only specific users can view Financial Accounts?

- **A. Grant users access to the Financial Account object with permission set**
- B. Change Organization-wide Defaults (OWD) sharing on the 'Financial Accounts' object to Public Read/Write'.
- C. Change Organization-wide Defaults (OWD) sharing on the 'Person Accounts' object to 'Controlled by Parent.
- **D. Change Organization-wide Defaults (OWD) sharing on the 'Financial Accounts' object to Private'.**

Answer: A,D

Explanation:

To ensure that all users see Person Accounts, but only specific users can view Financial Accounts, the Admin should take the following steps:

Grant users access to the Financial Account object with permission set, which is a collection of settings and permissions that give users access to various tools and functions. The Admin can use permission sets to grant access to the Financial Account object and its fields to specific users or groups of users.

Change Organization-wide Defaults (OWD) sharing on the 'Financial Accounts' object to Private', which is a setting that determines the baseline level of access that users have to records they do not own or share. By setting the OWD sharing on the 'Financial Accounts' object to Private', the Admin can ensure that only the record owners and users above them in the role hierarchy can view the Financial Accounts. Verified References: 1

NEW QUESTION # 58

A consulting firm is asked to add Events and Milestones to a Lightning record page to give financial advisors deeper insights into their customers' lives.

What should the consultant configure to enable advisors to capture Once-in-a-Lifetime events and, at the same time, prevent users from accidentally creating more than one event of such an event type?

- A. Special event types
- **B. Unique event types**
- C. Single event types
- D. Once-in-a-Lifetime event types

Answer: B

Explanation:

To enable advisors to capture Once-in-a-Lifetime events and prevent users from accidentally creating more than one event of such an event type, the consultant should configure Unique event types. Unique event types are event types that can only be created once for each contact or individual, such as birth, death, or marriage.

By using Unique event types, the consultant can ensure that advisors can capture important life events for their customers and avoid duplication or inconsistency.

NEW QUESTION # 59

To access Financial Services Cloud Lightning Components "My Domain" must be enabled. How does the System Admin accomplish this?

- A. Register a subdomain using the My Domain wizard and then deploy it
- B. Open a case with Salesforce Support
- C. Enable Communities
- D. Go to Custom Settings and edit the Industries Settings

Answer: A

Explanation:

My Domain is a feature in Salesforce that allows you to create a subdomain for your org. You need to enable My Domain to access Financial Services Cloud Lightning Components, such as Actionable Relationship Center, Relationship Map, Life Events & Business Milestones, etc. To enable My Domain, you need to do the following:

Register a subdomain using the My Domain wizard in Setup > My Domain.

Deploy it to your users after testing it in your sandbox or developer org. Verified Reference: : Salesforce Help Article [7]

NEW QUESTION # 60

What type of record access can an administrator grant (2 answers)

- A. Read only
- B. Read/Write/Transfer
- C. Read/Write/Delete
- D. Read/Write only

Answer: A,D

NEW QUESTION # 61

A Financial Services Cloud (FSC) administrator is assigning permission set licenses to users, including personal bankers. Which permission set license is recommended for this set of users?

- A. FSC Basic permission set license
- B. FSC Standard permission set license
- C. FSC Extension permission set license
- D. FSC Foundations permission set license

Answer: B

Explanation:

Reference: Financial Services Cloud Permission Set Licenses - Salesforce Explanation: Permission set licenses are a way to grant additional permissions and access settings to users based on their job function or role. Permission set licenses can extend the functionality of the user's existing license type without changing it. Financial Services Cloud provides four permission set licenses that correspond to different user personas and use cases:

FSC Foundations: This permission set license grants access to basic Financial Services Cloud features, such as Client Segmentation, Relationship Groups, Relationship Map, Financial Accounts, Financial Goals, and Financial Summary. This permission set license is suitable for users who need to view and manage client data and relationships, such as personal bankers or service representatives.

FSC Basic: This permission set license grants access to advanced Financial Services Cloud features, such as Action Plans, Interaction Summaries, Interaction Participants, Financial Deals, Financial Deal Participants, and Record Alerts. This permission set license is suitable for users who need to track and execute client interactions and transactions, such as advisors or specialists.

FSC Extension: This permission set license grants access to additional Financial Services Cloud features that are not included in the other permission set licenses, such as Household Rollups and Compliant Data Sharing.

This permission set license is suitable for users who need to perform complex calculations or comply with data regulations, such as analysts or compliance managers.

FSC Standard: This permission set license grants access to all Financial Services Cloud features that are included in the other permission set licenses. This permission set license is suitable for users who need full access and functionality of Financial Services Cloud, such as super users or administrators.

NEW QUESTION # 62

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