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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q147-Q152):

NEW QUESTION # 147

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

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

Answer: B,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 # 148

Which three standard fields are available to track a customer's retirement goal progress?

- A. Total Value
- B. Actual value
- C. Target value
- D. Target Date
- E. Contributions

Answer: B,C,D

Explanation:

The following standard fields are available to track a customer's retirement goal progress:

Actual value, which is a currency field that represents the current value of the goal.

Target value, which is a currency field that represents the desired value of the goal.

Target Date, which is a date field that represents the expected date of achieving the goal.

NEW QUESTION # 149

How can the Salesforce Administrator make sure that highly sensitive Life Events or Business Milestones will not be shown until the event actually happened?

- A. Delete the value from the Event Type picklist on the Life Event Object or the Milestone type on the Business Milestone object
- B. Remove the Event or Milestone from the Lightning Component in the Developer Console.
- C. Hide the Event or Milestone on the Events & Business Milestones Lightning Component page properties.
- D. Life Events are part of the FSC managed package, therefore the Salesforce Admin must contact Salesforce Support to remove the Event from the Lightning Component.

Answer: C

Explanation:

To hide highly sensitive Life Events or Business Milestones until they happen, the Admin can hide them on the Events & Business Milestones Lightning Component page properties. The Events & Business Milestones Lightning Component is a component that displays a timeline of life events and business milestones for a client or a group. The Admin can use the page properties to customize the component and select which event types or milestone types to show or hide on the timeline². Verified References: ²

NEW QUESTION # 150

A Financial Services Cloud (FSC) administrator wants to create a new FSC permission set that includes the Access Interest Tags for Financial Services Cloud permission.

Which two permission sets should be cloned to create this new permission set and give access to interest tags?

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

Answer: A,D

Explanation:

The Access InterestTags for Financial Services Cloud permission is included in two permission sets that are provided by FSC:

FSC Foundations permission set: This permission set grants access to the core features of FSC, such as financial accounts, account groups, households, goals, referrals, and interest tags⁷.

FSC Extension permission set: This permission set grants access to additional features of FSC that extend beyond the core functionality, such as action plans, relationship groups, relationship maps, client tasks, client notes, and interest tags⁸.

To create a new FSC permission set that includes the Access Interest Tags for Financial Services Cloud permission, either of these permission sets can be cloned and modified as needed.

References:

FSC Foundations Permission Set

FSC Extension Permission Set

NEW QUESTION # 151

It has been determined that integration with an external system is required, as the data needed by a wealth management client resides in another system. This data will be sent from the external system via an API, and Salesforce needs to be configured in preparation for the data.

Which two items should be configured?

- A. A Lightning web component to restrict data from users
- B. Objects and fields to store the data
- C. An integration User and Integration Profile to enable the connection
- D. A flow to get the data into Salesforce

Answer: B,C

Explanation:

To integrate with an external system, Salesforce needs to have objects and fields that can store the data that will be sent from the external system via an API. These objects and fields should match the data structure and format of the external system as much as possible. Additionally, Salesforce needs to have an integration user and an integration profile that can enable the connection between Salesforce and the external system. The integration user is a dedicated user account that has access to the API and can perform data operations on behalf of other users. The integration profile is a custom profile that defines the permissions and settings for the integration user.

NEW QUESTION # 152

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