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Oracle 1Z0-1065-22 Exam Syllabus Topics:

Topic	Details
Topic 1	• Deployer Installation Management (15%) • Deployment Architecture Overview • Common applications for Procurement
Topic 2	• Deployer Setup and Configuration, internal and external network configurations • Deployer Setup and Configuration, internal and external network configurations
Topic 3	• Deployer Setup and Configuration, internal and external network configurations • Deployer Setup and Configuration, internal and external network configurations
Topic 4	• Set up 30AM Processes and manage them, including Initiatives, Processes, Provision of Resources, and Organization • Manage Deployer Configuration and Setup of its components
Topic 5	• Set up Procurement of Cataloged Inventory from Supplier, The Supplier Manager, Internal Service Center, B2B Communication • Deployer Procurement Configuration and Document Styles

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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q63-Q68):

NEW QUESTION # 63

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

Answer: B

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 inactive. Cloning an Action Plan Template creates a copy of it with a new name and ID, which can then be modified and published. Verified References: 4

NEW QUESTION # 64

The Salesforce Admin at Lake Tahoe Bank considering implementing Financial Services Cloud. What is the best way for the Admin to access a Financial Services pre-configured org, including data and the right licenses, to learn about the product?

- A. Request a Salesforce developer org.
- **B. Request a 30-day Financial Services Cloud trial org**
- C. Spin up a Salesforce sandbox org.
- D. Purchase one license of Financial Services Cloud and install it in a production org.

Answer: B

Explanation:

The best way for the Admin to access a Financial Services Cloud pre-configured org, including data and the right licenses, to learn about the product is to request a 30-day Financial Services Cloud trial org. You can sign up for the 30-day trial using this form. You get preconfigured and preloaded sample data so you can start playing around in your new org right away. Once you're done testing it out, you can transition your trial org to a production org with the help of your account executive or solution engineer.

Verified References: :

Trailhead Module 5

NEW QUESTION # 65

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- **A. Make the Adams Household Scott's primary Group and edit the Activities & Objects to fit.**
- B. Disable the Primary Group setting for Scott on the Adams Household
- C. Make the Adams Household Scott's primary Group and make Scott the primary member
- D. Add Scott as a Related Contact to the Adams Household.

Answer: A

Explanation:

To make sure that Scott's data is rolling up to the Adams Household, the Banker should make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up. 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. By making the Adams Household Scott's primary Group, the Banker can ensure that Scott's financial data is included in the household summary. The Banker can also edit the Activities & Objects to Roll Up to specify which items, such as financial accounts, goals, or referrals, should be rolled up for Scott. Verified References: : Salesforce Help Article 4

NEW QUESTION # 66

A Bank of the Future customer calls the bank to update the address on their account. The call center agent handling the call needs to enter a new address into the system. The agent enters the new contact information using an OmniScript and then needs to generate a prefilled PDF with the new address that can be shared with the customer.

Which two OmniStudio tools should a consultant recommend to generate the prefilled PDF?

- A. OmniStudio Action Document Generation
- B. Integration Procedure
- C. Calculation Procedure
- D. DataRaptor

Answer: A,D

Explanation:

The following OmniStudio tools should be recommended to generate the prefilled PDF:

OmniStudio Action Document Generation, which is a tool that allows users to create documents from templates and data sources using OmniScripts and Integration Procedures. By using OmniStudio Action Document Generation, the consultant can create a document template with placeholders for the contact and address information and generate a PDF file from it using an OmniScript. DataRaptor, which is a tool that allows users to extract and transform data from Salesforce or external systems using Integration Procedures. By using DataRaptor, the consultant can create a data source that retrieves the contact and address information from Salesforce and maps it to the document template placeholders.

NEW QUESTION # 67

A financial institution is concerned about contacting clients or sharing their data when they have requested not to be contacted.

Which action should the consultant take in Financial Services Cloud to address the institution's concern?

- A. Hide the client's contact information and add an approval process for allowing a user to access it to contact the client.
- B. Integrate the Consent object with their Consent Platform to track it in Salesforce.
- C. Implement Consent Management for Financial Services Cloud.
- D. Enable and implement the Late Regulation checkbox on the client record to track their request.

Answer: C

Explanation:

Consent Management for Financial Services Cloud is a feature that helps financial institutions honor and respect their customers' wishes when they request only specific forms of contact from their company or opt-out of certain types of data-sharing. This feature helps institutions comply with the data protection and privacy regulations that apply to their company¹. A consultant can suggest the following actions to implement Consent Management for Financial Services Cloud:

Set up tracking and storage of certain data privacy preferences: This involves creating data privacy records for customers who have opted out of certain types of communication or data-sharing, and selecting the appropriate options in the record to indicate their preferences².

Use the Consent API: This is an API that lets users query, create, update, or delete consent records for customers who have given or withdrawn their consent for certain types of communication or data-sharing.

Protect your Salesforce organization: This involves setting up organization-wide sharing settings, encryption, field-level security, and other measures to ensure that only authorized users can access or modify customer data according to their consent preferences.

References:

Consent Management for Financial Services Cloud

Set Up Tracking and Storage of Certain Data Privacy Preferences

[Use the Consent API]

[Protect Your Salesforce Organization]

NEW QUESTION # 68

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