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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q86-Q91):

NEW QUESTION # 86
Which three permission sets grant access or extend permissionsfor record alerts in Financial Services Cloud (FSC)?

- A. FSC Foundations permission set

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

Answer: A,B,D

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 withthis 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 # 87
One administrator user at a financial services company needs to help management build reports and gain insights into business performance by including branch management reportable objects.
Which two considerations should the administrator include when configuring the report?

- A. Branch Unit Related Record report types have related object names including Lead, Account, and Contact but exclude Financial Account.
- B. When Branch Unitis the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects.
- C. Bankers with Branches withOpportunities, Accounts. Leads, and Contacts report types are available for creating reports with Branch Unit Related Records.
- D. The reportable objects include Banker. Branch Unit, Branch Unit Related Records, and Branch Unit Customer.

Answer: C,D

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 Services Cloud. 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 RelatedRecord is an object that represents a record that is related to a branch unit, such as an opportunity, an account, alead, 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 # 88
What steps does the SalesforceAdministrator have to take to create a new Business Milestone Type?

- A. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component

- B. In the Object Manager go to the Business Milestone object and create a new field using the name of the new milestone.
- C. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
- D. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field

Answer: D

Explanation:
To create a new Business Milestone Type, you need to add a new picklist value on the Milestone Type field of the Business Milestone object. This field is used to categorize the different types of business milestones that can be tracked for a client. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 57.

NEW QUESTION # 89
A Salesforce administrator updating a record page to add a Chatter component to the Action Plan Lightning record page is unable to find the Chatter components for selection.
What is the reason for this?

- A. Feedtracking has to be enabled for the Action Plan object.
- B. Chatter has to be enabled for Action Plans via Chatter settings in setup.
- C. Admin users have to be assigned the Action Plans permission set.
- D. Salesforce is yet to roll out Chatter for the Action Plan object.

Answer: A

Explanation:
Feed tracking has to be enabled for the Action Plan object in order to add a Chatter component to the Action Plan Lightning record page. Feed tracking allows you to see updates on records in Chatter feeds. You can enable feed tracking for custom objects, such as Action Plan, from the setup menu. Once feed tracking is enabled, you can add Chatter components, such as Feed or Publisher, to the record page using the Lightning App Builder.References: [Feed Tracking], [Chatter Components]

NEW QUESTION # 90
An advisor is setting up a Household in Financial Services Cloud for their new clients, Oliver and Macie Dogging ton. The advisor created a Person Account record for both Oliver and Macie, and a Household record for the Dogging ton household. While creating the Household group, the advisor attempted to input the below information but received an error.
Member Name: Oliver Dogging ton
Role in Group: Client
Primary Member: Enabled
Primary Group: Enabled
Activities and Objects to Roll Up: All
Member Name: Macie Dogging ton
Role in Group: Spouse
Primary Member: Enabled
Primary Group: Enabled
Activities and Objects to Roll Up: All
Based on the information provided, what caused the error that the advisor received?

- A. Spouse is not a valid Role within a Group.
- B. Primary Group -two individuals cannot designate the same Household as their Primary Group.
- C. Primary Member - two individuals cannot be designated as the Primary Member of the same Household.
- D. Activities and Objects to Roll Up - two individuals cannot designate their activities to roll up to the same Household.

Answer: C

Explanation:
Reference: [Customize Roles for Person Accounts and Individuals | Salesforce Help] Explanation: A primary member is the person account who is the main contact for a household or a group.
Only one person account can be the primary member of a household or a group. The primary member is also used to calculate rollups for the household or group, such as total assets, liabilities, net worth, and so on. The advisor should designate either Oliver or Macie as the primary member of the Dogging ton household, but not both.

NEW QUESTION # 91
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