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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q53-Q58):

NEW QUESTION # 53

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 Foundations permission set
- D. OmniStudio User permission set

- E. FSC Basic permission set

Answer: B,C,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 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 # 54

A client has called their Financial Advisor to open an Education Savings Account for their first child. What 2 steps should the Financial Advisor take in the Financial Services Cloud App to capture that information?

- A. Create a Referral for the Banker for an Education Savings Account
- **B. Create a Life Event for the birth of the child and a Referral for the Education Savings Account**
- C. Create two Life Events, one for the birth of the child and one for the Education Savings Account.
- D. Create a case and include the target Savings amount for the Education Savings Account and relate the case to the child's Person Account.
- **E. Create a Life Event for the birth of the child and a Financial Goal for the Education Savings Account**

Answer: B,E

Explanation:

The following steps should be taken by the Financial Advisor in Financial Services Cloud App to capture the information about opening an Education Savings Account for their client's first child:

Create a Life Event for the birth of the child and a Referral for the Education Savings Account. A Life Event is a construct in Financial Services Cloud that allows you to track significant events in your client's life that may affect their financial needs or goals. You can use Life Events to create a record for the birth of the child and link it to the client's account. A Referral is a construct in Financial Services Cloud that allows you to capture a customer need or interest and assign it to another advisor or line of business. You can use Referrals to create a record for the Education Savings Account and route it to the appropriate banker.

Create a Life Event for the birth of the child and a Financial Goal for the Education Savings Account. A Financial Goal is a construct in Financial Services Cloud that allows you to track your client's financial objectives and measure their progress towards achieving them. You can use Financial Goals to create a record for the Education Savings Account and associate it with the client's account and financial accounts. Verified References: : Salesforce Financial Services Cloud User Guide, page 29. : Salesforce Financial Services Cloud User Guide, page 30. : Salesforce Financial Services Cloud User Guide, page 33.

NEW QUESTION # 55

While working for an insurance client implementing Financial Services Cloud, an API integration between Salesforce and a risk control system has been configured. The consultant is asked to ensure the correct profiles and permissions were set up for this connection. Which two steps should the consultant take?

- A. Assign the integration user to the System Administrator profile.
- **B. Create a dedicated Integration User.**
- C. Update the System Administrator profile to include the API Only User.
- **D. Create a new custom profile and ensure API Only is selected.**

Answer: B,D

Explanation:

To ensure the correct profiles and permissions for an API integration between Salesforce and a risk control system, the consultant should do the following steps:

Create a dedicated Integration User that will be used to authenticate and authorize the API calls between Salesforce and the risk control system. The Integration User should have a unique username, password, and security token that are not shared with other users or systems. The Integration User should also have the minimum permissions and access settings required to perform the integration tasks.

Create a new custom profile and ensure API Only is selected. The API Only option restricts the user from logging in to the Salesforce user interface, but allows the user to access the Salesforce API. The custom profile should also have the appropriate object permissions, field-level security, record types, page layouts, and other settings that are relevant for the integration. The custom profile should be assigned to the Integration User.

NEW QUESTION # 56

Cumulus Bank has implemented Compliant Data Sharing in Financial Services Cloud. Which two things happen when an opportunity record that has opportunity participants with associated share table entries is set to Private?

- A. The share table records are deleted.
- B. All opportunity participant records are deleted.
- C. The opportunity participant records are not deleted.
- D. Sharetable records need to be manually deleted.

Answer: A,C

Explanation:

The following things happen when an opportunity record that has opportunity participants with associated share table entries is set to Private:

The share table records are deleted, which means that any sharing access granted by the opportunity participants is revoked.

The opportunity participant records are not deleted, which means that they still exist on the opportunity record and can be viewed by users who have access to the opportunity.

NEW QUESTION # 57

An insurance company needs to ensure the record rollups aggregate information from related records for several objects in the Financial Services Cloud at a client or group level.

What should the administrator configure to meet the requirement?

- A. To show all Primary Group member cases on a related list at the group level, the administrator should add Cases as a picklist value to the Rollup__c field on Account Contact Relationship.
- B. Client-level records are aggregated by setting up client-level rollups to all primary group members.
- C. To show all Primary Group member opportunities on a related list at the group level, the administrator should add Opportunities as a picklist value to the Household__c field on Account Contact Relationship.
- D. When the administrator enables record rollups at the group level, all corresponding records are stamped with the Primary Group in the Rollup__c lookup field.

Answer: D

Explanation:

According to the Salesforce documentation¹, record rollups at the group level allow you to aggregate information from related records for several objects in Financial Services Cloud. When you enable record rollups at the group level, all corresponding records are stamped with the Primary Group in the Rollup__c lookup field. This field is added to the Account, Contact, Account Contact Relationship, and Financial Account objects. You can then use this field to create reports and dashboards that show aggregated data for each group.

NEW QUESTION # 58

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