



# FINANCIAL-SERVICES-CLOUD<sup>Q&As</sup>

Salesforce Financial Services Cloud (FSC) Accredited Professional (AP)





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### QUESTION 1

Which information can you find under the Relationships Tab? - (Check the 3 that apply)

- A. Summary information about Total Financial Accounts. This includes total assets under management at your firm, the Category (i.e. Platinum.), client interactions, including the last interaction and the next interaction scheduled in the future.
- B. Primary household Information, including the members of the household and how the household is related to other groups.
- C. Related accounts - accounts not directly included in the primary household.
- D. Related contacts that play a role in the financial world of the client (i.e a family lawyer)

Correct Answer: BCD

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### QUESTION 2

Universal container uses a private sharing model for opportunities. The sales team wants sales engineers to be involved in specific Opportunities to help sales representatives close deals faster.

How can an administrator meet this requirement?

- A. Add sales engineers to account teams.
- B. Add chatter groups to opportunities.
- C. Enable chatter Feed Tracking on opportunities.
- D. Add sales engineers to opportunity teams.

Correct Answer: D

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### QUESTION 3

Which of these statements is correct?

- A. To give users access to the new action plans feature, you must add the Action Plans permission set to the user.
- B. Lightning is not required to enable Action Plans
- C. To assign the Action Plans permission set the user must have a Financial Services Cloud license.
- D. Assigning the Action Plan permission set automatically assigns an Action Plans permission set license to the user.

Correct Answer: AD

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#### QUESTION 4

What standard object has a one-to-many relationship with the account object? (3 answers)

- A. Lead
- B. Opportunity
- C. Campaign
- D. Contact
- E. Case

Correct Answer: BDE

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#### QUESTION 5

The support group at universal container wants agents to capture different information for product support and inquiry cases. In addition, the lifecycle for product support cases should have more steps than the lifecycle for inquiry cases.

What feature should an administrator use to meet the requirement? (3 answers)

- A. Permission sets
- B. Record Types
- C. Support processes
- D. Page layouts
- E. Field-level Security

Correct Answer: BCD

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