



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

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

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### QUESTION 1

Sales representatives at universal containers should not be able to create leads, delete their own accounts, or send mass emails

How can an administrator meet these requirements?

- A. Modify a standard profile.
- B. Create a custom profile.
- C. Change the organization-wide default settings.
- D. Create a sharing rule.

Correct Answer: B

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### QUESTION 2

What relationship can be selected in a custom report type where accounts is the primary object and contacts is the related object? (2 Answers)

- A. Each account may or may not have related contacts.
- B. Each account must have a related account
- C. Each contact may or may or may not have a related account.
- D. Each account must not have related contacts

Correct Answer: AB

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### QUESTION 3

Universal Containers uses a custom field on the account object to capture the account credit status. The sales team wants to display the account credit status on opportunities.

Which feature should a system administrator use to meet the requirements?

- A. Look-up Field
- B. Roll-up summary field
- C. Workflow field update
- D. Cross-object formula field

Correct Answer: D

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#### QUESTION 4

Which one of the following statements is not correct about Action Plans?

- A. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagement, such as account openings, loan approvals, and claims processing.
- B. Capture repeatable tasks in templates and then automate the task sequences with an action plan.
- C. Automatically schedule the next appointment with the Advisor
- D. Manage customer engagements consistently and collaboratively with automated and compliant task orchestration.

Correct Answer: C

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#### QUESTION 5

Which of the following is NOT an area that Salesforce Financial Services Cloud serves?

- A. Asset Management
- B. Corporate and Institutional Banking
- C. Legal Services
- D. Lending Services

Correct Answer: C

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