



FINANCIAL-SERVICES-CLOUD^{Q&As}

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QUESTION 1

Which statement is true if a custom fiscal year is enabled? (2 answers)

- A. The custom fiscal year automatically updates product schedules.
- B. The custom fiscal year must be defined manually
- C. The defined custom fiscal year only affects forecasts
- D. The custom fiscal year setting CANNOT be disabled

Correct Answer: BD

QUESTION 2

What functionality is included in the Financial Services Cloud Extension license? (2 correct answers)

- A. It enables user access to the Actionable Relationship Center Lightning component
- B. It enables user to configure Compliant Data Sharing
- C. It enables user access to the Action Plans feature
- D. It enables user access to Download Analytics Data and Install
- E. Analytics Templated Apps

Correct Answer: AB

QUESTION 3

An opportunity record created with a close date of July 30, meets the criteria of time - dependent workflow rule. The time dependent action is scheduled for July 23. What happens if the opportunity is edited before July 23 and no longer meets the criteria?

- A. The time dependent action is automatically removed from the queue
- B. The time dependent action is put on hold
- C. The time dependent action will execute on July 30.
- D. The time dependent action will execute on July 23

Correct Answer: A

QUESTION 4

Not all life events or business milestones apply to every customer. To create a better customer experience, you can



hide the life events or business milestones a customer hasn't achieved or is unlikely to achieve in the future. Which of the following statements are correct?

- A. When you hide a life event or business milestone type, it doesn't appear on the component until you add an event or milestone of that type.
- B. The option to hide life event types or business milestone types is not available in the Communities version of the Life Events or Business Milestones component.
- C. It is possible to hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal.
- D. Life Events can not be displayed on the Household level of the Account Record.

Correct Answer: AC

QUESTION 5

Scott Adams is opening a savings account at his mom's bank. The personal banker Hank Burton wants to make sure all Scott's financial data is rolling up to his parent's household, Adams Household. Rachel Adams, Scott's mom already is the primary member of the Adams Household.

How can the banker accomplish this?

- A. Make the Adams Household Scott's primary group and make him the primary member.
- B. Make the Adams Household Scott's primary group and edit the Activities and Objects to roll up.
- C. Disable the primary group setting for Scott on the Adams Household.

Correct Answer: B

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