



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

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





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**QUESTION 1**

Relationship Management enables you to (Check the 3 that apply)

- A. Define who are the members of a Relationship Group.
- B. Define the Role of the Member of the group
- C. Display Financial Holding Data
- D. Define Primary Group for a Member

Correct Answer: ABD

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**QUESTION 2**

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

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**QUESTION 3**

Sam is the Salesforce Admin for Valley Bank. The bank's financial advisors are complaining they can't see an accurate summary of their client's financial data as clients often change households. Sam wants to give his financial advisors a better view of the client's complete financial situation. How can he set this up using FSC?

- A. Create a custom object to track the client's financial data
- B. Use Process Builder to create a workflow to summarize data at the Person Account level
- C. Set client's financial data to be rolled up using Primary Group feature

Correct Answer: C

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**QUESTION 4**

Which is a feature of Chatter? (3 answers)

- A. Feeds
- B. Events



C. Bookmarks

D. Recommendations

E. Notes

Correct Answer: ADE

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#### QUESTION 5

You are getting started with a Financial Services Cloud org. What's a reason why you cannot see the Lightning components and any pre-configured sample data after you set up "My Domain"?

A. Contact Salesforce to enable "My Domain"

B. Confirm that you click "Deploy to Users" to permanently deploy the custom domain to users

C. You need to switch to Salesforce Classic

D. It is working as designed. You need to configure Financial Services Cloud to create new Lightning components and sample data.

Correct Answer: B

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#### QUESTION 6

Universal Container wants to ensure that users complete the standard industry field when creating a new account record. To address the concern the administrator set the Industry field as required. However, some users are still able to create a new account record without completing the Industry Field.

What should an administrator do to troubleshoot the issues? (2 answers)

A. Verify the field-level security for the industry field is not set to "Read Only" on the user profiles.

B. Verify the industry field is set as required on all the account page layouts assigned to the users

C. Verify the users have the "Modify all data" permission for account on their profiles

D. Verify the users have the "Edit" permission for accounts on their profiles

Correct Answer: AB

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#### QUESTION 7

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 8

What must an administrator do when creating a record type?

A. Create a new page layout for the record type

B. Set the field-level security for the record type

C. Assign the record type to the appropriate profiles

D. Add the record type to the required user records

Correct Answer: C

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#### QUESTION 9

Universal containers set the organization-wide defaults for cases to private. When a case is escalated, case ownership changes to Tier 2 support agent.

How can a system administrator give the sales operation team read/write access to all escalated cases?

A. Create a case escalation rule.

B. Create a case assignment rule.

C. Create a criteria-based sharing rule.

D. Create an ownership-based sharing rule.

Correct Answer: C

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#### QUESTION 10

Universal Containers requires that the organization-wide default for opportunities be set to public read/write. However, sales users are complaining that opportunity reports return too many results, making it difficult to find their team's opportunities in the report results.

How can the system administrator address this problem?

A. Use the show filter to filter report results and reduce records returned

B. Move the opportunity reports into each user's personal reports

C. Update the sharing rules to limit user access to certain opportunity



D. Move the opportunity reports into a folder with restricted access

Correct Answer: A

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#### QUESTION 11

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 12

When using sharing rules, what can records be shared with? (2 answers)

- A. Roles and subordinates
- B. Profiles
- C. Queues
- D. Public Groups

Correct Answer: AD

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#### QUESTION 13

What user interface setting must be enabled for users to edit records in a list view? (2 answers)

- A. Enhanced lists
- B. Enhanced page layout editor
- C. Inline editing
- D. Enhanced profile list views

Correct Answer: AC

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#### QUESTION 14



Which field settings can you control in the Page Layout Editor? (3 answers)

- A. Dependent
- B. Required
- C. Controlling
- D. Read only
- E. Visible

Correct Answer: BDE

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#### QUESTION 15

A feature that captures, refers, routes, and prioritizes customer needs across business lines

- A. Expressed Interest
- B. Report
- C. Referrals
- D. Opportunity

Correct Answer: C

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