

FINANCIAL-SERVICES-CLOUD Q&As

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QUESTION 1

Which of the following would be considered a Junction Object in Salesforce?

- A. A custom object that contains a lookup field to a standard object
- B. Two standard objects that have lookup relationship with each other
- C. A many-to-many relationship created with two master-detail relationship
- D. A many-to-many relationship created with two lookup relationships

Correct Answer: C

QUESTION 2

What item appears in a user\\'s My Unresolved items after synchronization (2 answers)

- A. Contacts not assigned to an account
- B. Cases not assigned to a contact
- C. Note not associated to a record
- D. Emails not associated to a record

Correct Answer: AB

QUESTION 3

Which of the following allows you to report on historical data in Salesforce in order to monitor and spot trends?

- A. summary report
- B. matrix report
- C. joined report
- D. tabular report E. Reporting snapshot

Correct Answer: E

QUESTION 4

Which Option is available when using the process visualizer? (2 answers)

- A. Share annotated approval process diagrams
- B. View approval processes as a flow chart



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- C. Add approval steps from the process visualizer
- D. Edit the criteria used to trigger the approval process

Correct Answer: AB

QUESTION 5

What permission is set in a user\\'s profile? (3 answers)

- A. Mass email
- B. Marketing user
- C. Active
- D. Run Reports
- E. Object Permissions

Correct Answer: ADE

QUESTION 6

Universal Containers needs to synchronize data between sales force and an external financial system.

How can a system administrator accomplish this?

- A. Use an external ID field to match records between systems
- B. Use the excel connector to export records from both systems
- C. Use the data loader to match records between the systems
- D. Use the data loader to upsert Salesforce records into the financial system

Correct Answer: A

QUESTION 7

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



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D. Page layouts

E. Field-level Security

Correct Answer: BCD

QUESTION 8

Financial Advisors can create a financial goal to track a client\\'s progress toward major purchases, retirement savings, or other life goals. Which statements are correct?

- A. You can only create savings-oriented goals.
- B. You can\\'t create a goal for paying down a debt.
- C. You can associate a goal with a specific financial account.
- D. Financial Goals require the Financial Goals permission set to be visible to a user.

Correct Answer: AB

QUESTION 9

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

QUESTION 10

What are the valid organization-wide default options for the Account Object?

- A. Public Read/Write/Transfer
- B. Private
- C. No Access
- D. Public Read/Write/Delete

Correct Answer: B

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QUESTION 11

What is the purpose of the service cloud (customer) portal? (2 answers)

- A. To share support reports and dashboards with high profile accounts
- B. To provide Web self-service by exposing knowledge articles
- C. To allow customers to log and check the status cases online
- D. To allow partners to access contact records for case collaboration.

Correct Answer: BC

QUESTION 12

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 13

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 14

Universal Containers wants to automatically back up all the Salesforce data on a monthly basis.

Which tool can a system administrator use to meet this requirement?



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- A. Data export service
- B. Analytic snapshot
- C. Import wizard
- D. Scheduled report.

Correct Answer: A

QUESTION 15

A user is having trouble logging into Salesforce. The users login history shows that this person has attempted to log in multiple times and has been locked out of the organization.

How can the system administrator help the user log into Salesforce? (2 answers)

- A. Click reset password on the users record detail page.
- B. Send an email to the user containing the user\\'s password
- C. Log in as the user and enter a new password
- D. Click unlock on the users record detail page

Correct Answer: AD

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