

FINANCIAL-SERVICES-CLOUD Q&As

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QUESTION 1

Universal container has two sales groups; each group has its own unique sales process.

What is the best way to ensure that sales representatives have access to only the stages relevant to their sales process when working on opportunities?

- A. Record Types
- B. Multi-Select Picklists
- C. Page Layouts
- D. Roles

Correct Answer: A

QUESTION 2

How can you set up Referral creation?

- A. As a global action
- B. As a standard action
- C. On a Community
- D. As a Flow

Correct Answer: ABC

QUESTION 3

The administrator at universal containers will create a custom field to track a specific Tier 2 support user on a case record.

What data type should be used while creating this custom field?

- A. Hierarchical relationship
- B. Lookup relationship
- C. Formula
- D. Lookup Filter

Correct Answer: B

QUESTION 4



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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

QUESTION 5

Which setting can a system administrator enable in the user interface? (2 answers)

- A. Customizable recent tags
- B. Printable list views
- C. Chatter messenger for specific users
- D. Related list hover links

Correct Answer: BD

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