

FINANCIAL-SERVICES-CLOUD^{Q&As}

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QUESTION 1

What happens when you make changes to a Financial account record or primary group membership?

- A. The rollup by lookup (RBL) configuration automatically updates the corresponding RBL summaries at the client and group levels.
- B. The Admin needs to update the rollup by lookup (RBL) rules.
- C. The Admin has to deactivate the Rollup By Lookup (RBL) rules and then force RBL recalculations.

Correct Answer: A

QUESTION 2

What type of field allows users to input text, images, and links?

- A. Input area
- B. Text and Image area
- C. Text area
- D. Text area (rich)

Correct Answer: D

QUESTION 3

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 4

A user at Universal container reports an error message when attempting to log in. the administrator checks the user's login history, but there is no record of the attempted login.

What could be cause of this issue?

- A. The user is attempting to log in outside of the profile login range
- B. The user is attempting to log in outside of the profile IP
- C. The user is attempting to log in with wrong username
- D. The user is attempting to log in with wrong password

Correct Answer: C

QUESTION 5

What object do you use to model a client in Financial Services Cloud?

- A. Account
- B. Person Account
- C. Contact
- D. Create a custom object

Correct Answer: B

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