

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

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

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## QUESTION 1

Which information can you find under the Relationships Tab? - (Check the 3 that apply)

- A. Summary information about Total Financial Accounts. This includes total assets under management at your firm, the Category (i.e. Platinum.), client interactions, including the last interaction and the next interaction scheduled in the future.
- B. Primary household Information, including the members of the household and how the household is related to other groups.
- C. Related accounts - accounts not directly included in the primary household.
- D. Related contacts that play a role in the financial world of the client (i.e a family lawyer)

Correct Answer: BCD

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## QUESTION 2

Kim Johnson, a client of Lake Tahoe Bank, hired Liz Obrian from Pine Cone Law Firm as her new lawyer. The Advisor wants to capture that information in the Actionable Relationship Center. What entities in Financial Services Cloud will the Advisor use to create this relationship?

- A. Account-Account relationship to add Pine Cone Law Firm and Contact-Contact relationship to add Liz Obrian.
- B. Account-Account relationship to add Pine Cone Law Firm and Account-Contact relationship to add Liz Obrian.
- C. Account-Contact relationship to add Pine Cone Law Firm, Contact-Contact relationship to add Liz Obrian.

Correct Answer: A

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## QUESTION 3

What tab setting on a profile makes a tab NOT accessible on the All Tabs page or visible in any apps?

- A. Read-Only
- B. Default On
- C. Default Off
- D. Tab Hidden

Correct Answer: D

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## QUESTION 4

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

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## QUESTION 5

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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