

FINANCIAL-SERVICES-CLOUD^{Q&As}

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QUESTION 1

Which accounts are automatically synchronized on Salesforce classic

- A. Accounts that the users own
- B. All recently accessed accounts
- C. Accounts selected with the sync button
- D. Any account created in the last 30 days

Correct Answer: B

QUESTION 2

Which of these statements are true for Rollups in Financial Services Cloud?

- A. Rollups are done at both the client and group levels
- B. All financial accounts information, such as account balances are calculated and summarized at the Financial Account Summary level
- C. Activities can not be rolled up on the activity timeline at group/household level.

Correct Answer: B

QUESTION 3

What is included in an FSC license?

- A. Lightning Scheduler
- B. Action Plans
- C. Einstein Analytics for Financial Services
- D. FSC for Community

Correct Answer: B

QUESTION 4

Which feature in Financial Services Cloud helps businesses identify, track, and route customer needs?

- A. Intelligent Needs-Based Referrals
- B. Lightning App Builder

C. Relationship Builder and Map

D. Surveys

Correct Answer: A

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

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