

FINANCIAL-SERVICES-CLOUD^{Q&As}

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QUESTION 1

How can a sales user relate an opportunity to a campaign? (2 answers)

- A. Use the campaign hierarchy related list on the opportunity.
- B. Select the primary campaign source for the opportunity.
- C. Use the campaign influence related list on the opportunity.
- D. Select the campaign record type when creating the opportunity.

Correct Answer: BC

QUESTION 2

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

QUESTION 3

Which dashboard component can display data from the summary rows of reports? (2 answers)

- A. Chart
- B. Metric
- C. Table
- D. Gauge

Correct Answer: AC

QUESTION 4

What is a method for adding content to Salesforce CRM content? (2 answers)

- A. Attachments
- B. Chatter files

C. Libraries

D. Documents

Correct Answer: BC

QUESTION 5

Which object would you use to model the relationship between business contact and the client on the relationship group?

A. Account Contact Relationship

B. Account Account Relationship

C. Contact Contact Relationship and Reciprocal Role

D. Reciprocal Role

Correct Answer: C

QUESTION 6

What type of customization can be done on Activities? (Tasks and Events) (3 answers)

A. Workflow Rules

B. Custom Fields

C. Field Tracking

D. Assignment Rules

E. Validation Rules

Correct Answer: BCE

QUESTION 7

A feature that captures, refers, routes, and prioritizes customer needs across business lines

A. Expressed Interest

B. Report

C. Referrals

D. Opportunity

Correct Answer: C

QUESTION 8

What must an administrator do when creating a record type?

- A. Create a new page layout for the record type
- B. Set the field-level security for the record type
- C. Assign the record type to the appropriate profiles
- D. Add the record type to the required user records

Correct Answer: C

QUESTION 9

Universal Containers wants to create a custom object to capture account survey data. Users must be able to select an account from the survey record. Users also need the ability to view related surveys on the account record.

How should the system administrator meet this requirement? (2 answers)

- A. Create a lookup relationship field on the account object.
- B. Add the account related list to the survey page layout.
- C. Create a lookup relationship field on the survey object.
- D. Add the survey related list to the account page layout.

Correct Answer: CD

QUESTION 10

Which of the following are FSC components that visualize groups and relationships in Lightning pages? (Check the 2 that apply)

- A. Relationship Map and Group Builder
- B. Related Accounts
- C. Goal to Group Member Mapping
- D. Person Life Events

Correct Answer: AB

QUESTION 11

What level of access can be set when sharing a document folder with users? (2 answers)

- A. Read/write/create/delete
- B. Read-only
- C. Read/write/create
- D. Read/write

Correct Answer: BD

QUESTION 12

Universal container uses a private sharing model for opportunities. The sales team wants sales engineers to be involved in specific Opportunities to help sales representatives close deals faster.

How can an administrator meet this requirement?

- A. Add sales engineers to account teams.
- B. Add chatter groups to opportunities.
- C. Enable chatter Feed Tracking on opportunities.
- D. Add sales engineers to opportunity teams.

Correct Answer: D

QUESTION 13

When can a validation rule be used to prevent invalid data? (3 answers)

- A. When records are edited by a user
- B. When records are deleted by a user
- C. When records are submitted using web-to-lead
- D. When records are imported E. When records are updated by a workflow rule

Correct Answer: ACD

QUESTION 14

A sales executive at Universal containers wants to be notified whenever high-value opportunities are created for hot accounts.

How should an administrator meet this requirement?

- A. Create an escalation rule based on the opportunity amount.
- B. Create the workflow rule on opportunity object.

- C. Create an auto-response rule on the opportunity amount.
- D. Create a validation rule that evaluates the account rating

Correct Answer: B

QUESTION 15

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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