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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q15-Q20):

NEW QUESTION # 15

Which three types of Account-Account relationships are displayed in the Actionable Relationship Center?

- A. Accounts & Peers
- B. Accounts & Members
- C. Accounts & Businesses
- D. Accounts & Groups

Answer: A,C,D

Explanation:

Explanation

The following types of Account-Account relationships are displayed in the Actionable Relationship Center (ARC):

Accounts & Businesses: This type of relationship shows the accounts that are related to a business account, such as owners, partners, or beneficiaries. You can use this type of relationship to understand the ownership structure and financial interests of a business account.

Accounts & Peers: This type of relationship shows the accounts that are related to another account by a peer-to-peer relationship, such as friends, colleagues, or associates. You can use this type of relationship to identify potential referrals and cross-selling opportunities from an account's network.

Accounts & Groups: This type of relationship shows the accounts that are related to a group account, such as household members, trust members, or business group members. You can use this type of relationship to view the aggregated financial data and activities of a group account. Verified References:

Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 16

Lake Tahoe Bank is rolling out FSC and the VP of IT is concerned about the cost of the licenses. The system admin recommends using licenses for users that need only limited access to FSC features. Which FSC permission set license enables user access to a license with contractual restrictions for FSC and can be used to grant restricted access to users like Bank Tellers?

- A. FSC Standard
- B. Client segmentation
- C. FSC Extension
- D. FSC Basic

Answer: D

NEW QUESTION # 17

Which of the following objects do support Group-Level Rollups?

- A. Opportunities
- B. Action Plans
- C. Tasks
- D. Financial Accounts
- E. Alerts

Answer: A,B,D

Explanation:

The following objects dosupport Group-Level Rollups:

Financial Accounts: You can use Group-Level Rollups to display the total balance, total market value, and total cost basis of all the financial accounts that belong to a group.

Action Plans: You can use Group-Level Rollups to display the number of action plans, the number of completed action plans, and

the completion percentage of all the action plans that are associated with a group.

Opportunities: You can use Group-Level Rollups to display the total amount, expected revenue, and weighted amount of all the opportunities that are related to a group. Verified References:

1: Salesforce Financial Services Cloud Implementation Guide, page 80.

2: Salesforce Financial Services Cloud Implementation Guide, page 81.

3: Salesforce Financial Services Cloud Implementation Guide, page 82.

NEW QUESTION # 18

Which chart type can be used to display summary values from two different levels of grouping in a report. (2 answers)

- A. Stacked bar chart
- B. Donut chart
- C. Funnel chart
- D. Grouped line chart

Answer: A,D

NEW QUESTION # 19

To access all Financial Services Cloud (FSC) functionalities available out of the box, a consultant must install the FSC Managed Package and the Unmanaged Extension Packages.

Which two functionalities are included in the FSC Unmanaged Extension Packages?

- A. Predefined list views of clients and households
- B. Field sets that configure how fields display in the client and household profiles
- C. The Commercial Banking dashboard
- D. Custom objects to track Financial Accounts and Household

Answer: B,C

NEW QUESTION # 20

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