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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample

Questions (Q161-Q166):

NEW QUESTION # 161

Rachel is the primary member of the Adams household hired a new attorney. What type of relationship should the Wealth Advisor create in Financial Services Cloud for Rachel and her attorney before assigning the reciprocal role of "Attorney"?

- A. Create an Account-Contact relationship between the Adams Household and the attorney.
- B. Create a Contact-Contact Relationships between the primary member of the Adams Household and the attorney.
- C. Create an Account-Account relationship between the Adams Household and the attorney
- D. Create an Account-Account Relationship between the Addams Family Trust and the attorney.

Answer: A

NEW QUESTION # 162

What 3 functionalities are supported by the Relationship Map and Group Builder?

The Relationship Map and Group Builder allows the user to:

- A. enable or disable Enable Rollup Summary calculations.
- B. define what data is being rolled up to the Household.
- C. define the Role of the Members of the Household
- D. define the Primary Group for a Member.
- E. display Financial Holdings.

Answer: B,C,D

NEW QUESTION # 163

The Salesforce Admin at Lake Tahoe Wealth Management Company wants to ensure that the advisors at his firm can quickly see the most important client data in the Actionable Relationship Center (ARC). What must the Admin configure for each object to display the most important fields on the side panel of ARC?

- A. Lightning Record Pages
- B. Field Sets
- C. Page Layout
- D. Search Layout
- E. Compact Layout

Answer: E

Explanation:

To display the most important fields on the side panel of ARC, the Admin must configure the Compact Layout for each object. The Compact Layout is a layout that determines which fields appear in key places in Salesforce such as record highlights areas, list views, lookup dialogs, and global search results. The Admin can use the Compact Layout to select up to 10 fields that are most relevant for each object and display them on the side panel of ARC

NEW QUESTION # 164

What steps does the Salesforce Administrator have to take to create a new Business Milestone Type?

- A. Find Person Life Event using the Object Manager and add a new picklist value on the Milestone Type Field.
- B. In the Object Manager go to the Business Milestone object and create a new field using the name of the new milestone.
- C. In the Lightning Page Editor add the new Milestone Type to the Life Events & Business Milestones Lightning component
- D. Find Business Milestone using the Object Manager and add a new picklist value on the Milestone Type Field

Answer: C

NEW QUESTION # 165

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

Answer: C

NEW QUESTION # 166

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