



DEMO VERSION

Salesforce

Financial-Services-Cloud Exam

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



Exam Latest Version: 21.3



Question 1. (Multi Select)

[FSC Data Model and Configuration]

What actions can a Wealth Advisor take from the Life Events card?

- A: Create Case
- B: Create Lead & Referral
- C: Open an Account
- D: Request Record Approval
- E: Create Opportunity

Correct Answer: B, D, E

Question 2. (Single Select)

[FSC Data Model and Configuration]

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

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

Correct Answer: C

Question 3. (Multi Select)

[Financial Accounts, Rollups, and Referrals]

Which three of these statements are true for Rollup By Lookup (RBL) in Financial Services Cloud?

- A: An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.
- B: Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.
- C: The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels
- D: Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules
- E: RBL rules do not require a lot of processing power.

Correct Answer: A, C, D

Question 4. (Multi Select)

[Financial Accounts, Rollups, and Referrals]

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

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

Correct Answer: C, D, E

Question 5. (Multi Select)

[Relationship and Group Management]

Which 3 options does the Financial Services Cloud application offer to view and update Account-Account, Account-Contact, and Contact-Contact Relationships?

- A: Actionable Relationship Center
- B: Family Members Component
- C: Relationship Map
- D: Group Members Component
- E: Life Events Component

Correct Answer: A, C, D

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