Free Salesforce Financial Services Cloud Accredited Professional (AP-208) Practice Questions

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Question 1

Question Type: MultipleChoice

[FSC Data Model and Configuration]

A financial services company needs a custom field for reporting when relating two-person accounts to each other. Which object should the Financial Services Cloud consultant configure the custom field on?

Options:

A- Account Contact Relationship
B- Contact-Contact Relationship
C- Person Account
D- Account Account Relationship

Answer:

D

Question 2

Question Type: MultipleChoice

[FSC Data Model and Configuration]

The Salesforce Admin of Lake Tahoe Bank wants to implement Financial Services Cloud using the individual object model. What are the steps to disable person accounts? (Choose Three)

Options:

A- Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
B- Assign the Person Account record type to the user profiles.
C- Disable the Person Account custom setting.
D- Remove Person Account record types from the Individual Record Type Mapper.
E- Assign the Individual record type to the user profiles.

Answer:

A, D, E

Question 3

Question Type: MultipleChoice

[Action Plans and Workflows]

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the clientonboarding process. Where can Hank see Action Plan Tasks? (2 options)

Options:

A- Hank will be able to see the Action Plan tasks on therelated list of the Account page layout.
B- Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.
C- Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.
D- Hank will be able to see the Action Plan Tasks assigned to him on his calendar.

Answer:

A, B

Question 4

Question Type: MultipleChoice

[FSC Features and Functionality]

A financial services company offers special deposit products for its employees. These employees have customer records in Salesforce so that they can be serviced like normal customers. Only customer service employees within a specific group should be able to see these special deposit products in Salesforce to protect the personal financial information of bank employees.

How should the administrator configure sharing rules in Financial Services Cloud to meet these requirements?

Options:

A- Create an Account sharing rule based on record owner.
B- Create Account sharing rules based on criteria.
C- Create a Financial Account sharing rule based on record owner.
D- Create a Financial Account sharing rule based on criteri

Answer:

D

Question 5

Question Type: MultipleChoice

[Relationship and Group Management]

A System Administrator has received a note from one of theportfolio managers that the ActionableRelationship Center (ARC) is not visible when the portfolio manager was trying to set up relationships between two accounts. The portfolio manager has also mentioned that other colleagues in the same role have accessto it and are able to use it to manage their customer's relationships. What is a possible cause for this?

Options:

A- The portfolio manager has not been given the permissions that enable users to view and manage ARC
B- The portfolio manager does not have access tothe Lightning page that has the ARC component added
C- The portfolio manager does not have access to the account records that he is trying to create for.
D- The ARC Component has not been added to the page layout

Answer:

A

Question 6

Question Type: MultipleChoice

[FSC Features and Functionality]

Cumulus Cloud Bank, a major financial services provider, has engaged Salesforce Professional Services to transform its operations with Financial Services Cloud (FSC). The Addams family are wealth management clients with the following relationships:

* The wife and her husband are part of the Addams Household.

The wife is the primary member, and together the couple run the Addams Charitable Trust.

* The wife is also part of the Symonds Household with her father as the primary member. Which tool should the Salesforce FSC consultant recommend so a wealth manager could make sense of this complex data to provide impeccable service to the Addams family and discover new business opportunities?

Options:

A- Data Filtering and Sorting in Tableau Desktop
B- Financial Services Cloud Einstein
C- Data Visualization with Marketing Cloud Intelligence
D- Actionable Relationship Center (ARC), an advanced visualization engine

Answer:

D

Question 7

Question Type: MultipleChoice

[FSC Features and Functionality]

Cumulus Insurance has created a Delegated Administrator group for its franchise users to reduce the workload on head office support staff.

Which three functions should be added tothe Delegated Administrator group?

Options:

A- Unlock users.
B- Modify permission sets.
C- Set organization-wide sharing defaults on custom objects.
D- Assign or remove permission sets for users in their delegated groups.
E- Create and manage membership of specified public groups.

Answer:

A, D, E

Question 8

Question Type: MultipleChoice

[FSC Features and Functionality]

A financial services company would like its users to be able to relate two business accounts. Whatshould the administrator configure to meet the requirement?

Options:

A- Create a new Contact Reciprocal Role for the required value.
B- Update the Role picklist on the Account-Account Relationship object with new value.
C- Create a new Account Reciprocal Role for the required value.
D- Update the Role picklist on the Account-(?ontact Relationship object with new value.

Answer:

B

Question 9

Question Type: MultipleChoice

[FSC Features and Functionality]

Cumulus Bank has branches in multiple countries that are required to report in local currency, while the corporate headquarters office wishes to see reports in a single currency (the corporate currency).

Which solution should a consultant recommend to meet these requirements?

Options:

A- Set the default currency for head office and have the regions download their reports to Excel and convert them manually.
B- Use a third party from AppExchange add-on to implement currency conversions.
C- Enable multiple currencies and advanced currency management, and set a corporate currency for the corporate headquarters office.
D- Allowusers to set their preferred currency in their profile and design reports that convert currencies for the user running the report.

Answer:

C

Question 10

Question Type: MultipleChoice

[FSC Features and Functionality]

A Financial Services Cloud (FSC) administrator is setting up a permission set for Actionable Relationship Center. Which license should the administrator select on the Permission Set setup page?

Options:

A- FSC Standard
B- FSC Basic
C- OmniStudio
D- FSC Extension

Answer:

A