

# Salesforce Financial Services Cloud

1. Universal Containers uses a custom field on the account object to capture the account credit status.

The sales team wants to display the account credit status on opportunities.

Which feature should a system administrator use to meet the requirements?

A. Look-up Field

B. Roll-up summary field

C. Workflow field update

D. Cross-object formula field

**Answer(s): D**

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2. An opportunity record created with a close date of July 30, meets the criteria of time - dependent workflow rule. The time dependent action is scheduled for July 23. What happens if the opportunity is edited before July 23 and no longer meets the criteria?

A. The time dependent action is automatically removed from the queue

B. The time dependent action is put on hold

C. The time dependent action will execute on July 30.

D. The time dependent action will execute on July 23

**Answer(s): A**

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3. Universal container has two sales groups; each group has its own unique sales process.

What is the best way to ensure that sales representatives have access to only the stages relevant to their sales process when working on opportunities?

A. Record Types

B. Multi-Select Picklists

C. Page Layouts

D. Roles

**Answer(s): A**

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4. A marketing user needs to create a new campaign, but the New Button is NOT visible from the campaign home page. The system administrator has verified that the user has the "Create" profile permission for the campaign object.

How should the system administrator resolve the issue?

A. Select the Marketing User checkbox in the user record.

B. Select the "Manage Campaigns" profile permission.

C. Grant the user "Read" profile permission for the campaign.

D. Add the New button to the page layout using the page layout

**Answer(s): A**

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5. What can an administrator configure for users on the search results? (3 answers)

A. Filters by which users can narrow down results

B. Objects included in the search

C. Fields being searched on for each object.

D. Number of records displayed for each object.

E. Columns displayed for each object.

**Answer(s): C D E**

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6. What user interface setting must be enabled for users to edit records in a list view? (2 answers)

A. Enhanced lists

B. Enhanced page layout editor

C. Inline editing

D. Enhanced profile list views

**Answer(s): A C**

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7. The support group at universal container wants agents to capture different information for product support and inquiry cases. In addition, the lifecycle for product support cases should have more steps than the lifecycle for inquiry cases. What feature should an administrator use to meet the requirement? (3 answers)

A. Permission sets

B. Record Types

C. Support processes

D. Page layouts

E. Field-level Security

**Answer(s): B C D**

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8. Sales management at universal containers needs to display the information listed below in each account record:

- Amount of all closed won opportunities
- Amount of all open opportunities

Which feature should a system administrator use to meet this requirement?

A. Calculated columns in the related list

B. Roll-up summary fields

C. Cross-Object formula fields

D. Workflow rules with field updates

**Answer(s): D**

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9. What type of field allows users to input text, images, and links?

A. Input area

B. Text and Image area

C. Text area

D. Text area (rich)

**Answer(s): B**

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10. When case assignment rules are being setup, cases can be assigned to whom? (2 answers)

A. Queue

B. User

C. Case Team

D. Contact

**Answer(s): B D**

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11. What should an administrator consider when setting up case feed?

A. Case feed replaces the standard case detail page by default

B. The Use Case Feed permission is automatically active for all profiles

C. Case feed requires the Service Cloud User feature license

D. Chatter Feed tracking must be enabled for the case object.

**Answer(s):** A B

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**12.** What type of record access can an administrator grant (2 answers)

A. Read/Write only

B. Read only

C. Read/Write/Delete

D. Read/Write/Transfer

**Answer(s):** D

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**13.** Which statement is true if a custom fiscal year is enabled? (2 answers)

A. The custom fiscal year automatically updates product schedules.

B. The custom fiscal year must be defined manually

C. The defined custom fiscal year only affects forecasts

D. The custom fiscal year setting CANNOT be disabled

**Answer(s):** A B

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**14.** A system administrator at Universal Containers needs to transfer records from one user to another.

What object can be transferred using the mass transfer tool? (2 answers)

A. Leads

B. Campaigns

C. Quotas

D. Accounts

**Answer(s): C**

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**15.** 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

**Answer(s): A D**

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**16.** A system administrator at universal containers created a new account record type. However, sales

users are unable to select record type when creating new account records.

What is a possible reason for this? (2 answers)

A. The record type does not have an assigned page layout

B. The record type has not been added to the sales user profile

C. The record type has not been set as the default record type

D. The record type has not been activated.

**Answer(s):** B D

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**17.** 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.

**Answer(s):** B C

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**18.** What will happen when a user attempts to log in to Salesforce from an IP outside the users profile but within the organization-wide trusted IP range?

A. The user will not be able to log in at all.

B. The user will be able to log in after the computer is activated.

C. The user will be able to log in without activating the computer.

D. The user will be able to log in after answering the security question.

**Answer(s):** A

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**19.** When importing data, what happens if some records do NOT met the data validation criteria?

A. Import process ignores the data validation criteria

B. Import process aborts when it encounters the first invalid record

C. Import process fails only for the records with invalid data.

D. Import process requires user authorization to import the invalid records

**Answer(s): D**

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**20.** What can be modified on standard object fields? (2 answers)

A. Field type

B. Label

C. Default text

D. Help text

E. Picklist Values

**Answer(s): C**

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