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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q170-Q175):

### NEW QUESTION # 170

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a members FinancialAccount Balances are not adding

up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

- A. Ensure the Primary Group flag in the Account record is checked.
- B. Ensure that the member is the Primary Member in that Household
- C. EnsureRollUpByLookup Configuration is Active
- D. Ensure the reported Household is the Primary Group for the member
- E. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.

**Answer: C,D**

Explanation:

To troubleshoot the issue of Financial Account Balances not adding up to the Financial Summary field in the related Household, the Admin should take the following steps:

Ensure RollUpByLookup Configuration is Active, which is a custom setting that enables or disables the Rollup By Lookup (RBL) feature. RBL is a feature that allows users to aggregate data from financial accounts and display it at the client and group levels<sup>1</sup>.

Ensure the reported Household is the Primary Group for the member, which is a field on the Account object that indicates whether an account is the primary group for a contact or an individual. The primary group determines which financial summary fields are displayed on the contact or individual page<sup>2</sup>. Verified References: 12

#### NEW QUESTION # 171

Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Lead
- B. Account
- C. Contact
- D. Residential Loan Application
- E. Opportunity

**Answer: B,D,E**

Explanation:

The following records support Document Checklist Items out of the box in Financial Services Cloud:

Account: An Account is a record that represents a person or an organization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.

Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.

Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services.

You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes, or agreements. Verified References: 1 : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

#### NEW QUESTION # 172

A Salesforce administrator updating a record page to add a Chatter component to the Action Plan Lightning record page is unable to find the Chatter components for selection.

What is the reason for this?

- A. Salesforce is yet to roll out Chatter for the Action Plan object.
- B. Admin users have to be assigned the Action Plans permission set.
- C. Feedtracking has to be enabled for the Action Plan object.
- D. Chatter has to be enabled for Action Plans via Chatter settings in setup.

**Answer: C**

Explanation:

Feed tracking has to be enabled for the Action Plan object in order to add a Chatter component to the Action Plan Lightning record page. Feed tracking allows you to see updates on records in Chatter feeds. You can enable feed tracking for custom objects, such

as Action Plan, from the setup menu. Once feed tracking is enabled, you can add Chatter components, such as Feed or Publisher, to the record page using the Lightning App Builder. References: [Feed Tracking], [Chatter Components]

### NEW QUESTION # 173

How are identification documents, other assets, liabilities, goals, and revenue modeled, in an existing Financial Services Cloud org using the individual account model?

- A. An administrator is logged in to Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.
- B. Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the Account object.
- C. Document, Note, and Attachment objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the person account.
- D. Assuming there are no other issues, what should happen when the administrator uploads the import file?  
The Attachment object is used to represent other assets, liabilities, and goals. In the individual model, these attachments are related to the Account object.

#### Answer: D

Explanation:

In an existing Financial Services Cloud org using the individual account model, custom objects are used to represent other assets, liabilities, and goals. These objects are related to the Account object via lookup relationships. For example:

The Other Asset object is used to represent non-financial assets owned by an account holder, such as real estate properties, vehicles, or jewelry.

The Other Liability object is used to represent non-financial liabilities owed by an account holder, such as mortgages, loans, or taxes.

The Financial Goal object is used to represent financial objectives pursued by an account holder, such as retirement planning, education funding, or debt reduction. Verified References:

1: Salesforce Help Article [10]

2: Salesforce Help Article [11]

3: Salesforce Help Article [12]

### NEW QUESTION # 174

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- A. Add Scott as a Related Contact to the Adams Household.
- B. Disable the Primary Group setting for Scott on the Adams Household
- C. Make the Adams Household Scott's primary Group and make Scott the primary member
- D. Make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up.

#### Answer: D

Explanation:

To make sure that Scott's data is rolling up to the Adams Household, the Banker should make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up. A primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use primary Group to roll up financial data from all the financial accounts that are related to the client or the group. By making the Adams Household Scott's primary Group, the Banker can ensure that Scott's financial data is included in the household summary. The Banker can also edit the Activities & Objects to Roll Up to specify which items, such as financial accounts, goals, or referrals, should be rolled up for Scott. Verified References: : Salesforce Help Article 4

### NEW QUESTION # 175

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