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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q61-Q66):

NEW QUESTION # 61

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

Answer: C,E**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 levels¹.

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 page². Verified References: 12

NEW QUESTION # 62

Lake Tahoe Bank would like to restrict their Financial Services Cloud users from viewing certain types of milestones that might be irrelevant to their customers or might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

- A. The Salesforce Admin can manage sensitive Life Events using Permission Sets.
- B. The Salesforce Admin can hide the life Event or Business Milestone type, by removing it from the Event Type picklist.
- C. The Salesforce Admin can manage sensitive Life Events using sharing rules.
- D. The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane.

Answer: B**NEW QUESTION # 63**

To access Financial Services Cloud Lightning Components "My Domain" must be enabled. How does the System Admin accomplish this?

- A. Open a case with Salesforce Support
- B. Enable Communities
- C. Go to Custom Settings and edit the Industries Settings
- D. Register a subdomain using the My Domain wizard and then deploy it

Answer: D**NEW QUESTION # 64**

Personal Banker Hank Burton receives a call from the client Rachel Adams. Rachel can't access her checking account details. What FSC feature that links customers, financial accounts, or households to specify issues should Hank use to report this issue?

- A. Relationship Builder and Map
- B. Activities
- C. Cases & Alerts
- D. Service Requests

Answer: C**NEW QUESTION # 65**

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?

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

Answer: A,C,E

NEW QUESTION # 66

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