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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q120-Q125):

### NEW QUESTION # 120

Lake Tahoe Bank allows more than two owners on Financial Accounts. The Salesforce Admin wants to make sure that balances are rolled up to all joint owner's primary Households. Which 2 options does the Salesforce Admin have to accomplish this?

- A. Enable all RBL (Rollup By Lookup) rules to ensure the balances are rolled up to the householdlevel.
- B. Disable RBL (Rollup By Lookup) rules that rollup balances using joint owner on Financial Account.
- C. Enable the 'Enable Rollup Summary' in custom settings
- D. Enable RBL (Rollup By Lookup) rules that rollup balances using Financial Account Role for joint owners.
- E. Create custom RBL (Rollup By Lookup) rules to rollup the joint owner balances.

**Answer: D,E**

Explanation:

Rollup By Lookup (RBL) is a feature in Financial Services Cloud that allows you to display summary calculations of financial account information, such as balances, market values, and cost bases. You can use RBL to roll up financial data to all joint owners' primary households by doing the following:

Create custom RBL rules to rollup the joint owner balances using the Joint Owner field on the Financial Account object.

Enable RBL rules that rollup balances using Financial Account Role for joint owners using the Account Role field on the Account Contact Relationship object. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 75.

#### NEW QUESTION # 121

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

Answer: A,B

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 # 122

How can the Salesforce Admin change the configuration to summarize Financial Goals at the household level?

- A. Financial Goals can not be summarized at the household level.
- B. Update the selection in "Activities & Objects to Roll Up" to include Financial Goals
- C. Add a custom Rollup By Lookup (RBL) rule.
- D. Create a formula field and add it to the Account page layout

Answer: B

Explanation:

To change the configuration to summarize Financial Goals at the household level, you need to update the selection in "Activities & Objects to Roll Up" to include Financial Goals. This option is available in Setup > Financial Services Settings > Activities & Objects to Roll Up. By selecting Financial Goals, you enable Group-Level Rollups for Financial Goals, which display the total number of goals, completed goals, and completion percentage of all the goals that belong to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 81.

#### NEW QUESTION # 123

A wealth management division manages the financial assets of many wealthy clients.

Which three steps should the Financial Services Cloud consultant take to offer a high level of customization to boost user productivity?

- A. Assign the Custom Field Set To a Lightning component.
- B. Create and assign the Custom Field Set permission set to all users.
- C. Create a new type of person account so trust group details roll down to the beneficiaries level.
- D. Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers.
- E. Assign the Custom Field Set to the Financial Summary component.

Answer: A,D,E

Explanation:

The following steps should be taken by the consultant to offer a high level of customization to boost user productivity for the wealth management division:

Create a Custom Field Set solely for the Wealth Managers without affecting the Investment Bankers. A Custom Field Set is a construct in Financial Services Cloud that allows you to define a collection of fields that can be displayed in a Lightning component, such as the Financial Summary or the Financial Account List.

You can use Custom Field Sets to customize the fields that are relevant for different user groups or business scenarios, without modifying the underlying data model or page layout. You can create a Custom Field Set by going to Setup > Object Manager > Financial Account > Field Sets and adding or removing fields according to your requirements.

Assign the Custom Field Set to the Financial Summary component. The Financial Summary component is a Lightning component that displays aggregated financial data for a selected record, such as an account, contact, or opportunity. You can use the Financial Summary component to provide a holistic view of your client's financial situation and goals. You can assign a Custom Field Set to the Financial Summary component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel.

Assign the Custom Field Set To a Lightning component. A Lightning component is a reusable unit of user interface that can be added to any Lightning page, such as record pages, app pages, or Home pages. You can use Lightning components to enhance the functionality and user experience of your pages. You can assign a Custom Field Set to a Lightning component by using the Lightning App Builder and selecting the Custom Field Set from the Component Properties panel. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 : Salesforce Help Article 3

#### NEW QUESTION # 124

Which two limitations should a Salesforce Administrator consider before enabling Person Accounts?

- A. Person Accounts can be enabled and disabled only by contacting Salesforce Support
- B. Person Accounts cannot be disabled once they were enabled
- C. Creating a client record via Salesforce Inbox is not supported.
- D. AppExchange packages will not work if Person Accounts are enabled

**Answer: B,C**

Explanation:

The following limitations should be considered before enabling Person Accounts in Financial Services Cloud:

Person Accounts cannot be disabled once they were enabled. Enabling Person Accounts is an irreversible action that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before enabling it in production.

Creating a client record via Salesforce Inbox is not supported. Salesforce Inbox is a feature that allows you to access Salesforce data and actions from your email application. However, you cannot use Salesforce Inbox to create a client record as a Person Account. You can only create a client record as an Individual Model record using Salesforce Inbox. Verified References: : Salesforce Help Article 4 : Salesforce Help Article 5

#### NEW QUESTION # 125

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