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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q146-Q151):

NEW QUESTION # 146
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. Ensure that the member is the Primary Member in that Household
- D. Ensure the reported Household is the Primary Group for the member
- E. EnsureRollUpByLookup Configuration is Active

Answer: D,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. RBLis 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 # 147
Lake Tahoe Bank needs to conduct periodic reviews with their customers to review credit & debit card usage, review account payables and discuss credit needs. The bank wants to ensure such activities are tracked and exceptions are reported &followed up on in a timely manner. How can Financial Services Cloud support these requirements?

- A. Run a nightly process to create tasks and assign them to account owners for follow-ups
- B. Train account owners to create required tasks periodically and setdue dates for tracking.
- C. Create an Action Plan Template with associated pre-determined Tasks and automate the periodical creation of Action Plans for customer accounts.
- D. Use Lightning Scheduler to periodically schedule tasks for account owners.

Answer: C

Explanation:
As explained in the previous question, Action Plans are a feature that can help users track and manage common client processes. By creating an Action Plan Template with associated pre-determined Tasks, such as reviewing credit & debit card usage, reviewing account payables, and discussing credit needs, users can ensure that these activities are tracked and followed up on in a timely manner. Users can also automate the periodical creation of Action Plans for customer accounts using Process Builder or Apex triggers.

NEW QUESTION # 148
Lake Tahoe Bank is migrating customer records from the Individual Model to Person Accounts. Which threesteps should a Data Architect take to ensure a successful migration?

- A. Ensure Person Accounts is enabled on the org
- B. Configure your Person Account record types m the Indrvidual Record Type Mapper.
- C. Use a CSV field to map PersonRecordTypeld to the Person Account RecoroTypeld and use Data Loader to update Client Records
- D. Log a case with Salesforce to perform the conversion from the indrvkJual Model to Person Accounts.
- E. Enable 'Individual to Person Account Migration' in Custom Settings.

Answer: A,B,C

Explanation:
The following steps are required to migrate customer records from the Individual Model to Person Accounts in Financial Services Cloud:
Ensure Person Accounts is enabled on the org. You need to have Person Accounts enabled before you can convert Individual Model records to Person Accounts. You can enable Person Accounts by contacting Salesforce Support or by using the Enable Person Accounts option in Setup > Account Settings.
Configure your Person Account record types in the Individual Record Type Mapper. You need to map your existing Individual Model record types to the corresponding Person Account record types. You can do this by using the Individual Record Type Mapper option in Setup > Financial Services Settings.
Use a CSV file to map PersonRecordTypeId to the Person Account RecordTypeId and use Data Loader to update Client Records. You need to update the Client records with the correct PersonRecordTypeId value that matches the Person Account RecordTypeId value. You can do this by using a CSV file andData Loader to perform a bulk update operation. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 :
Salesforce Help Article 3

NEW QUESTION # 149
How should developers configure customized nodes for display in Actionable Relationship Center (ARC)?

- A. Select Use FlexCard from the node Display tab to show the node in a FlexCar
- B. Reference the FlexCard in the Display properties of the custom ARC relationship graph.
- C. Reference the Lightning web component in the Display properties of the custom ARC relationship graph.
- D. Select OmniScript from the node Actions tab U