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## AP-208 Practice Exam Fee | AP-208 Examcollection Questions Answers

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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q135-Q140):

### NEW QUESTION # 135

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

**Answer: C**

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 # 136

A consultant is configuring ademo for a customer but cannot create new residential loan application records.

What is prohibiting the consultant from creating a new residential loan application?

- A. The administrator did not enable "Allow Mortgage Access" in Setup.
- B. The user does not have "Mortgage User" checked in their user record.
- **C. The administrator did not assign the Mortgage permission set to the user.**
- D. The Residential Loan Application flow was not enabled in the setup.

**Answer: C**

Explanation:

The administrator did not assign the Mortgage permission set to the user. The Mortgage permission set is required to access the Residential Loan Application object and its related objects, such as Loan Application Form, Loan Assessment, and Loan Product. Without this permission set, the user cannot create, edit, or view residential loan application records. The administrator can assign the Mortgage permission set to the user from the user detail page in Setup. References: [Mortgage Permission Set], [Residential Loan Application Object]

### NEW QUESTION # 137

A corporate investment banking associate at Cumulus Capital works with a trusted analyst to create pitch books, analyze market data, and generate reports. The banking associate is looking to capture sensitive deal information in Salesforce. They wish to share the deal information with the trusted analyst only, without giving access to Salesforce users up the management chain in the Role Hierarchy.

What should a consultant do in Salesforce to build the required sharing model for sensitive deal data?

- **A. Use the Financial Deal object to capture the deal data and use restriction rules to block user access above the banking associate in the Role Hierarchy.**
- B. Use the Opportunity object to capture the deal data and use Compliant Data Sharing to grant the analyst access.
- C. Use the Financial Deal object to capture

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