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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q150-Q155):

### NEW QUESTION # 150

In Financial Services Cloud, what is the criteria for commas and symbols to be displayed correctly on the Financial Account Summary component?

- A. Account currency must match org default currency.

- B. User's locale and language must match user's currency.
- C. User currency must match org default currency.
- D. User's locale must match user's currency.

**Answer: D**

Explanation:

The criteria for commas and symbols to be displayed correctly on the Financial Account Summary component is that user's locale must match user's currency. The locale is a setting that determines how dates, times, numbers, and currencies are formatted and displayed for a user. The currency is a setting that determines how monetary amounts are formatted and displayed for a user. By matching the user's locale with their currency, FSC can ensure that commas and symbols are displayed correctly on the Financial Account Summary component according to the user's preferences and expectations

**NEW QUESTION # 151**

An advisor is setting up a Household in Financial Services Cloud for their new clients, Oliver and Macie Dogging ton. The advisor created a Person Account record for both Oliver and Macie, and a Household record for the Dogging ton household. While creating the Household group, the advisor attempted to input the below information but received an error.

Member Name: Oliver Dogging ton

Role in Group: Client

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Member Name: Macie Dogging ton

Role in Group: Spouse

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Based on the information provided, what caused the error that the advisor received?

- A. Spouse is not a valid Role within a Group.
- B. Primary Member - two individuals cannot be designated as the Primary Member of the same Household.
- C. Activities and Objects to Roll Up - two individuals cannot designate their activities to roll up to the same Household.
- D. Primary Group - two individuals cannot designate the same Household as their Primary Group.

**Answer: B**

Explanation:

Reference: [Customize Roles for Person Accounts and Individuals | Salesforce Help] Explanation: A primary member is the person account who is the main contact for a household or a group.

Only one person account can be the primary member of a household or a group. The primary member is also used to calculate rollups for the household or group, such as total assets, liabilities, net worth, and so on. The advisor should designate either Oliver or Macie as the primary member of the Dogging ton household, but not both.

**NEW QUESTION # 152**

A financial services company offers special deposit products for its employees. These employees have customer records in Salesforce so that they can be serviced like normal customers. Only customer service employees within a specific group should be able to see these special deposit products in Salesforce to protect the personal financial information of bank employees.

How should the administrator configure sharing rules in Financial Services Cloud to meet these requirements?

- A. Create Account sharing rules based on criteria.
- B. Create a Financial Account sharing rule based on criteria
- C. Create an Account sharing rule based on record owner.
- D. Create a Financial Account sharing rule based on record owner.

**Answer: B**

Explanation:

To meet the requirements of sharing special deposit products for employees, the administrator should create a Financial Account sharing rule based on criteria. A Financial Account sharing rule is a sharing rule that grants access to financial account records based

on record owner or field values. A sharing rule based on criteria is a type of sharing rule that grants access to records that meet certain criteria. By creating a Financial Account sharing rule based on criteria, the administrator can share the special deposit products with the customer service employees within a specific group based on a field value that indicates the product type.

### NEW QUESTION # 153

The Salesforce Admin of Lake Tahoe Bank wants to implement Financial Services Cloud using the individual object model. What are the steps to disable person accounts? (Choose Three)

- A. Assign the Person Account record type to the user profiles.
- B. Assign the Individual record type to the user profiles.
- C. Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
- D. Disable the Person Account custom setting.
- E. Remove Person Account record types from the Individual Record Type Mapper.

**Answer: B,C,E**

Explanation:

The following steps are required to disable Person Accounts and use the Individual object model in Financial Services Cloud: Log a case with Salesforce to perform the conversion from Person Accounts to the individual model. You need to contact Salesforce Support to request the conversion from Person Accounts to the individual model.

This is an irreversible process 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 requesting the conversion in production.

Remove Person Account record types from the Individual Record Type Mapper. You need to remove any Person Account record types that are mapped to Individual record types in the Individual Record Type Mapper. This is a custom setting that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. You can access this setting by going to Setup > Financial Services Settings > Individual Record Type Mapper.

Assign the Individual record type to the user profiles. You need to assign the Individual record type to the user profiles that need to create or access Individual records. The Individual record type is a standard record type on the Account object that represents an individual person who is not directly related to your business, such as a prospect, influencer, or household member. You can assign record types by going to Setup > Profiles > Object Settings > Accounts > Record Types. Verified References: : Salesforce Help Article 5 :

Salesforce Help Article 6 : Salesforce Help Article 7

### NEW QUESTION # 154

A consulting firm is asked to add Events and Milestones to a Lightning record page to give financial advisors deeper insights into their customers' lives.

What should the consultant configure to enable advisors to capture Once-in-a-Lifetime events and, at the same time, prevent users from accidentally creating more than one event of such an event type?

- A. Once-in-a-Lifetime event types
- B. Special event types
- C. Single event types
- D. Unique event types

**Answer: D**

Explanation:

To enable advisors to capture Once-in-a-Lifetime events and prevent users from accidentally creating more than one event of such an event type, the consultant should configure Unique event types. Unique event types are event types that can only be created once for each contact or individual, such as birth, death, or marriage.

By using Unique event types, the consultant can ensure that advisors can capture important life events for their customers and avoid duplication or inconsistency.

### NEW QUESTION # 155

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